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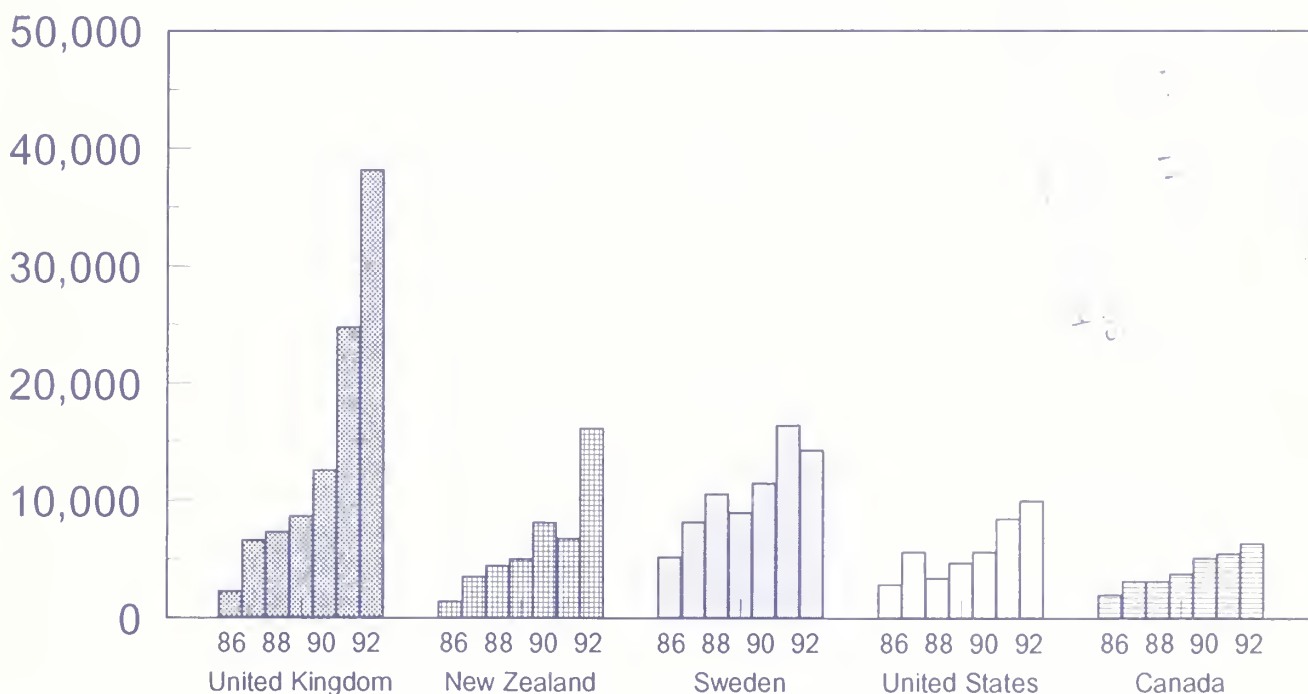
Foreign
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Circular Series
FHORT 4-94
April 1994

World Horticultural Trade & U.S. Export Opportunities

Australia's Wine Exports Continue to Boom To All Major Export Markets

Kiloliters



Source: Australian Wine and Brandy Corporation.

Australia's wine industry is progressive and export-oriented. Established in the mid-1800's, the industry has gone through a lot of restructuring, and now four companies account for the vast majority of production. The industry expects to continue its export boom, and is forecasting total export sales to reach A\$1 billion (about US\$715 million) by the year 2000, if not sooner. In 1992/93, exports totaled 103,000 kiloliters, valued at A\$288 million. Continued plantings and capital investment are necessary for the Australian wine industry to reach its goals. [For further details on the outlook for competition from Australia's horticultural industry, see article on page 12.]

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Robert B. Tisch	202-720-0898	Citrus, raisins, and prunes

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Export Summary

U.S. horticultural exports in January 1994 totaled \$582 million, 17 percent above the same month a year earlier. Dramatic increases in exports of oranges, grapefruit, apples, frozen french fries, almonds, walnuts, hazelnuts, raisins, prunes, and potato chips were the major contributors to this outstanding performance. Declines were noted in ginseng, preserved fruit and vegetables, hops, and nursery products except cut flowers. During the first four months (October to January) of fiscal year (FY) 1994, the total value of horticultural exports was \$2.6 billion, 9.5 percent above the same level last year.

All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds,
 1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon, 1 hectoliter (hl.) =
 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
JAN 94

NAME		QUANTITY				VALUE (1,000 DOLLARS)					
GROUP	COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TOTDTE LAST YR	YR TOTDTE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR, FRUIT	CITRUS MT										
	GRAPEFRUIT	44,698	57,669	143,029	154,913	444,767	21,909	26,628	74,863	78,624	222,290
	LEMONS	10,921	13,429	48,472	49,346	127,336	6,817	8,132	31,758	42,378	96,268
	ORANGES, INCL TMPLS	43,743	49,678	131,160	125,446	562,596	21,283	22,486	64,770	71,529	279,503
	OTHER CITRUS	2,744	3,247	10,042	10,117	19,313	2,493	2,548	9,168	9,010	16,507
	Subtotal:----	102,108	124,025	332,705	339,823	1,154,014	52,504	62,774	180,561	201,541	618,001
FR, FRT, NON-CIT	MT										
	APPLES	51,722	77,771	224,597	268,648	487,808	31,652	48,388	140,740	165,134	297,141
	AVOCADOS	323	391	825	1,996	14,185	423	405	1,080	1,971	14,223
	CHERRIES SWT & TRT	37	38	199	1,46	25,747	45	63	445	297	11,252
	GRAPES	1,970	3,344	69,891	90,303	184,774	2,982	3,771	80,018	102,800	215,189
	KIWI FRUIT	659	1,406	2,112	3,382	8,359	838	2,017	2,879	4,882	12,071
	MELONS	3,205	3,868	20,356	20,304	196,473	2,057	2,673	11,110	11,563	74,192
	PAPAYA	598	582	2,574	2,546	7,596	1,128	1,116	4,763	4,845	14,151
	PEACHES & NCTRNS	464	493	2,819	2,013	63,998	659	617	2,475	1,890	57,507
	PEARS	10,227	10,049	47,957	59,773	98,815	6,382	5,535	28,584	33,261	60,258
	PLUMS/PRUNES	266	221	4,931	2,823	56,959	389	333	4,145	2,450	52,120
	STRAWBERRIES	889	1,223	7,345	6,557	45,415	1,318	2,659	17,437	17,712	77,172
	OTHER NON-CITRUS	1,718	1,029	14,125	17,461	53,452	936	941	12,849	15,886	5,860
	Subtotal:----	72,087	100,421	395,797	475,959	1,243,586	49,413	68,564	303,835	362,042	1,039,381
CND/PRP FRUIT	MT										
	CHERRIES TRT CND	638	288	2,569	1,696	7,322	1,154	476	4,437	3,022	12,632
	FRUIT MIXTURES	2,418	1,762	14,189	9,192	35,007	2,781	1,989	14,968	10,817	39,597
	MARACHINO CHRY	299	232	1,721	1,705	4,912	634	452	3,316	3,311	9,706
	PEACHES CANNED	1,383	1,221	6,974	6,152	21,390	1,374	1,130	6,867	5,742	20,960
	PINEAPPLE CANNED	409	93	1,716	1,522	4,295	380	121	1,582	1,369	3,931
	FRT PRP/PRES	4,427	3,908	21,674	20,450	61,466	5,532	4,515	26,181	23,761	75,437
	OTHER CANNED FR	1,384	2,865	8,701	9,494	32,246	1,762	2,308	9,326	8,918	30,629
	Subtotal:----	10,962	10,372	57,548	50,187	166,641	13,621	10,993	66,680	56,944	192,895
DRIED FRUIT	MT										
	PRUNES DRIED	4,666	4,693	33,049	22,522	84,752	8,004	10,103	50,452	50,144	137,529
	RAISINS DRIED	8,623	10,046	42,077	47,723	121,556	12,371	15,417	58,507	66,747	180,885
	OTHER DRIED FRUIT	1,126	1,540	8,068	8,145	19,865	3,096	3,272	20,443	21,107	49,337
	Subtotal:----	14,421	16,280	83,195	73,460	226,148	23,482	28,795	129,404	137,750	367,651
FROZEN FRUIT	MT										
	BLUEBERRIES, FZN	1,057	441	3,168	1,583	8,600	2,020	671	5,603	2,465	15,058
	STRAWBERRIES, FZN	943	1,794	3,592	6,759	16,017	1,197	2,280	4,514	8,874	20,864
	OTHER FZN FRUIT	712	874	5,779	3,721	16,231	926	1,258	6,059	6,059	23,726
	Subtotal:----	2,713	3,110	12,540	12,064	40,849	4,144	4,211	18,514	17,399	59,649
FRT&VEG JUICE (SSE)	KL										
	GRAPEFRUIT JU CNC	3,960	892	13,841	6,307	60,686	2,417	1,100	8,797	5,161	36,980
	ORANGE JU NT CNC	6,755	7,492	28,302	34,478	92,328	5,528	5,079	22,286	23,676	68,746
	ORANGE JUICE CNC	19,531	16,158	83,222	66,371	349,883	8,040	10,559	34,387	40,840	140,737
	OTHER JUICES	26,507	21,552	111,520	100,964	363,216	15,213	14,624	61,215	66,077	214,146
	Subtotal:----	56,754	46,096	236,886	208,122	866,115	31,199	31,363	126,686	135,755	460,611
VEGETABLES FR	MT										
	ASPARAGUS, FR, CHLD	420	900	936	1,381	21,288	1,288	4,040	2,595	5,323	62,514
	BROCCOLI	9,249	14,897	33,851	42,181	102,948	7,051	9,001	23,949	25,992	69,469
	CAULIFLOWER	6,002	9,282	22,137	31,353	70,346	4,821	5,826	16,702	20,482	49,628
	CELERY	10,947	11,884	41,567	42,996	115,257	6,194	4,142	17,464	14,754	51,058
	LETTUCE, FR, CH.	27,936	28,828	114,973	115,537	315,002	12,620	10,341	52,119	45,089	154,873
	ONIONS, FR	10,063	7,369	56,328	46,164	183,005	5,350	4,427	22,762	19,964	71,840
	PEPPERS	4,626	3,178	24,307	17,488	60,961	3,089	2,666	15,540	15,270	48,485
	TOMATOES, FR, CH.	11,686	10,112	58,538	46,498	167,332	10,813	13,424	54,135	45,166	133,834
	OTHER VEG, FR	36,341	37,596	148,886	154,366	638,936	24,249	24,787	105,304	105,244	355,598
	Subtotal:----	117,275	124,050	501,527	498,238	1,675,138	75,580	77,818	310,574	301,460	997,304
VEGETABLES CANNED	MT										
	CATSUP & CHILI SA	1,625	2,030	7,246	7,719	23,641	1,205	1,857	5,909	6,915	18,526
	SWEET CORN CANNED	11,792	14,647	60,769	60,109	176,881	9,217	10,956	45,172	47,592	132,161
	TOMATO PASTE	4,820	5,560	22,751	27,955	73,238	3,969	4,368	17,625	23,261	59,815
	TOMATO SAUCE	4,208	5,143	21,159	25,020	68,893	4,463	5,439	20,385	25,694	65,694
	OTHER CANNED VEG.	18,287	13,652	72,245	70,175	229,778	21,277	16,895	89,163	89,163	278,154
	Subtotal:----	40,733	41,036	184,171	191,280	572,436	40,104	39,517	178,730	192,628	554,351
FROZEN VEGETABLES	MT										
	FROZEN FRENCH FRY	16,066	19,880	66,739	78,044	211,387	11,387	14,394	47,396	55,224	149,434
	FZN SWT CORN	4,321	4,444	22,763	23,086	62,107	3,711	3,999	18,617	20,330	50,528
	OTHER POT, FZN	1,153	1,782	5,169	7,647	18,656	831	1,551	4,068	6,309	14,968
	OTHER FZN VEG	4,128	3,838	18,450	18,242	60,509	3,952	3,477	17,353	17,144	57,313
	Subtotal:----	25,669	29,945	113,123	127,020	352,660	19,882	23,423	87,435	99,008	272,244
DEHYD VEGETABLES	MT										
	GARLIC DEHY	567	672	2,087	2,535	7,478	1,305	1,586	5,133	6,114	18,182
	ONIONS DEHY	1,758	2,163	7,293	8,884	23,183	4,027	4,769	17,027	19,766	53,986
	POTATO DEHYD	2,435	3,122	10,977	13,023	34,315	2,319	3,263	9,916	13,506	35,043
	OTHER DEHY VEG.	2,227	2,334	11,841	8,425	32,937	4,051	4,583	17,696	18,326	49,325
	Subtotal:----	6,989	8,292	32,200	32,869	97,915	11,703	14,202	49,773	57,713	156,537
TREE NUTS	MT										
	ALMND SH/PRP	11,802	13,675	64,564	65,403	161,466	38,348	62,581	213,934	299,828	565,786
	ALMONDS, UNSHLD	978	726	7,894	5,257	15,878	1,947	1,965	14,184	13,864	32,772
	PISTACHIO, UNSHLD	1,036	736	5,727	3,701	12,840	3,357	2,083	19,833	10,861	42,591
	WALNUTS, SHLD	1,061	1,770	10,902	11,402	16,909	4,327	5,882	33,742	37,223	58,735
	WALNUTS, UNSHLD	311	1,486	28,552	37,735	33,152	862	2,659	57,654	72,453	67,492
	OTHER NUTS	4,910	4,792	24,117	27,123	57,568	12,620	14,951	68,294	78,037	168,454
	Subtotal:----	20,101	23,188	141,760	150,624	297,816	61,463	90,123	407,644	512,269	935,834
NURSERY PRODUCTS	NONE										
	CUT FLOWERS	0	0	0	0	0	2,878	2,920	11,227	12,247	38,122
	OTHER NURSERY	0	0	0	0	0	12,466	11,070	49,843	46,503	172,239
	Subtotal:----	0	0	0	0	0	15,344	13,990	61,071	58,751	210,362
HOPS & PRODUCTS	MT										
	HOP EXTRACT	530	708	2,029	2,094	4,027	6,930	7,246	34,506	28,082	66,837
	HOP PELLETS	400	297	2,222	1,190	5,116	2,241	1,741	13,913	7,232	30,931
	HOPS, NSFP	362	326	1,464	908	2,521	2,254	1,626	9,128	5,202	15,501
	Subtotal:----	1,294	1,332	5,716	4,192	11,665	11,426	10,644	57,548	40,546	113,275
WINE	KL										
	GRAPE WINES	7,206	7,014	35,620	34,688	117,688	9,723	10,862	50,978	52,255	165,337
	OTHER WINE PRODUCTS	583	495	6,379	4,820	14,839	397	588	2,904	3,678	11,242
	Subtotal:----	7,789	7,510	41,999	39,509	132,527	10,121	11,451	53,883	55,933	176,580
MISCELLANEOUS	KL										
	BEER & BEVERAGES	22,109	25,767	117,048	115,629	414,388	14,047	16,043	73,927	69,012	259,492
	EDIBLE PREPARATIONS	8,781	11,574	38,110	47,133	124,809	29,370	40,623	126,526	164,373	450,622
	GINSENG	61	61	671	561	894	7,090	5,563	78,663	51,958	104,376
	POTATO CHIPS	2,799	4,896	14,739	19,071	47,774	8,621	11,947	37,174	52,578	118,430
	OTHER MISC.	0	0	0	0	0	16,866	19,885	64,651	74,771	211,147
	Subtotal:----	33,752	42,299	170,570	182,396	587,867	75,996	94,062	380,942	412,694	1,144,069
Grand Total:							495,988	581,936			

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
JAN 94

NAME		QUANTITY				VALUE (1,000 DOLLARS)					
GROUP & COMMODITY		CURR MO LAST YR	CURR MO CURR YR	YR TDATE LAST YR	YR TDATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT	MT										
APPLES		3,870	2,318	21,775	14,402	119,770	1,399	1,477	7,093	6,714	70,726
AVOCADO		534	940	16,225	6,390	18,470	288	467	11,582	3,836	12,899
BANANA		276,732	285,091	1,166,326	1,151,244	3,536,585	76,081	74,515	320,246	308,796	1,004,787
CANTELOUPE		27,135	29,213	67,710	64,589	213,007	8,380	8,582	20,917	19,854	67,635
GRAPE		52,999	55,041	71,509	69,882	325,134	41,816	45,226	58,106	58,635	261,626
KIWIFRUIT		40	112	996	1,351	24,791	38	124	1,169	1,235	16,602
MANGO		2,153	1,124	5,169	1,887	110,290	2,483	1,705	5,323	6,270	84,344
PEACH		15,435	19,062	21,704	25,637	41,376	9,677	12,000	13,690	16,177	26,410
PEAR		1,043	1,105	2,746	2,720	64,825	621	445	4,610	4,694	32,038
PINEAPPLE		9,228	9,016	36,325	36,330	124,177	3,311	3,335	13,724	12,956	46,139
STRAWBERRY		1,226	1,587	3,543	3,661	14,470	2,092	3,840	7,044	8,110	22,158
OTHER MELON		15,982	14,978	37,428	40,251	114,510	6,046	5,266	13,899	14,901	41,350
OTHER FRUIT		44,041	46,018	168,485	163,113	512,714	20,158	23,882	77,038	79,556	205,691
Subtotal:----		450,424	466,010	1,619,948	1,584,464	5,220,125	172,396	180,868	554,446	541,799	1,892,412
DRIED FRUIT	MT										
DRD APRICOT		565	835	5,091	3,816	11,053	1,263	2,139	11,942	9,632	25,135
DRD FIG & PASTE		1,239	1,206	3,825	4,341	8,786	1,368	1,350	6,038	5,954	10,808
OTHER DRD FRUIT		6,646	2,719	12,546	9,528	29,643	4,531	4,102	12,936	14,046	36,546
Subtotal:----		8,451	4,761	21,463	17,686	49,483	7,163	7,592	30,917	29,633	72,490
FROZEN FRUIT	MT										
FZN BLUEBERRIES		373	541	1,524	1,814	5,677	724	785	3,023	2,624	9,926
FZN STR		1,176	728	2,716	1,838	19,937	1,757	976	3,725	2,537	21,271
OTHER FZN FRUIT		1,531	1,804	6,870	9,613	32,037	1,616	2,206	7,433	10,012	34,039
Subtotal:----		3,081	3,074	11,112	13,267	57,651	4,098	3,968	14,181	15,174	65,236
CANNED/PREP FRUIT	MT										
CANNED OLIVES		3,493	4,800	29,567	25,317	74,492	7,975	10,386	60,712	52,233	153,316
CANNED ORANGES		2,482	2,943	10,697	12,244	41,806	2,224	2,336	10,696	10,007	39,502
CANNED PEACH		2,234	2,317	14,223	10,874	23,011	1,454	1,327	10,049	5,958	15,375
CANNED PINEAPPLE		31,160	33,018	106,399	105,628	344,866	20,407	19,612	67,050	60,349	212,896
MIXED FRUIT		4,258	6,773	12,516	17,026	33,405	3,675	5,622	11,245	14,514	29,875
PREP/PRES FRUIT		3,735	4,031	18,386	19,069	58,233	4,230	4,634	20,513	21,135	66,860
OTHER CANNED FRUIT		3,371	4,380	13,850	18,505	47,278	4,718	5,823	19,374	24,216	60,772
Subtotal:----		50,736	58,265	205,641	208,667	623,093	44,686	49,742	199,642	188,415	578,600
FRT&VEG JUICE (SSE)	KL										
APPLE/PEAR JU		47,099	82,984	290,191	323,913	946,807	14,912	15,943	90,966	64,690	243,682
FCOJ		103,219	97,426	428,487	612,096	1,122,350	17,438	19,411	77,121	120,623	191,591
GRAPE JU		14,516	3,588	52,570	23,354	148,404	5,280	1,543	19,380	7,722	52,117
PINAP JU		32,387	33,650	105,684	104,580	339,270	8,136	8,150	26,001	23,847	77,767
OTHER FRUIT JU		10,203	24,492	38,370	55,729	149,384	5,997	9,390	22,210	30,964	77,630
Subtotal:----		207,426	242,142	915,304	1,119,674	2,706,217	51,766	54,440	235,680	247,848	642,789
FRESH VEGETABLES	MT										
GARLIC		982	1,676	1,645	12,593	29,171	937	1,337	1,571	6,616	23,144
ASPARAGUS		3,677	3,102	9,024	10,036	29,852	5,766	5,390	12,029	14,493	39,213
BELL PEPPER		23,483	21,064	47,125	44,796	121,859	19,055	19,173	44,501	49,295	129,247
CARROTS		5,870	6,061	29,089	32,918	51,431	1,702	1,427	7,379	7,647	14,066
CHILLI PEPPER		4,202	4,604	12,312	11,307	36,933	7,585	5,540	17,698	14,955	48,709
CUCUMBER		47,298	49,368	117,572	108,622	238,841	15,550	23,201	38,631	49,408	85,192
ONIONS		16,613	23,360	47,405	64,405	218,400	9,940	16,573	33,879	40,088	104,818
POTATO, INCL SD		32,891	31,949	91,631	111,725	302,186	4,792	7,023	13,814	24,001	49,686
SQUASH		15,745	18,488	41,863	45,863	95,290	11,172	10,778	31,889	25,549	87,590
TOMATOES		58,458	50,159	84,471	113,654	380,911	62,688	62,120	82,352	99,889	307,454
OTHER FRESH VEGETAB		3,968	32,390	95,673	94,082	285,285	21,412	21,099	57,670	58,212	156,317
Subtotal:----		243,192	242,226	577,816	650,007	1,790,165	160,603	173,666	341,418	390,158	1,045,351
CANNED/DEHYD VEGET	MT										
CND ARTICHOKE		887	1,068	4,052	2,916	20,456	1,378	1,732	6,619	4,684	32,256
CANNED BAMBOO		2,219	2,614	12,565	12,844	28,680	2,008	2,171	10,634	9,897	24,939
CND MSHROOMS		4,542	3,366	18,318	14,188	47,213	9,883	6,707	40,370	29,776	100,977
CND PIMIENTO		439	505	2,300	2,524	6,172	756	597	3,982	3,008	8,532
CND TOM		3,704	3,290	17,750	13,563	45,500	1,370	1,108	6,527	4,659	17,799
CANNED WATERCHESTNU		2,198	1,373	10,870	6,926	39,558	1,484	1,163	7,410	5,345	27,926
TOMATO PASTE & SAUC		1,459	2,060	7,778	6,307	40,209	844	1,230	4,550	3,813	27,282
DRIED MUSHROOMS		179	154	509	2,471	1,817	2,125	1,816	7,610	5,885	22,462
DRIED TOMATOES		261	666	2,472	2,586	6,491	963	2,351	10,072	10,130	25,842
OTHER DEHYD VEGETAB		9,043	6,899	25,193	30,556	86,337	6,071	4,473	19,659	19,001	61,180
OTHER CND VEG		14,196	17,371	69,510	70,048	197,571	15,737	17,244	70,813	74,457	208,971
Subtotal:----		39,132	39,164	171,024	163,533	523,108	42,624	40,600	188,249	170,660	558,172
FROZEN VEGETABLES	MT										
BROCCOLI FZN		18,075	11,632	64,835	39,016	170,431	11,662	7,798	43,109	26,892	113,224
CAULIFLOWER FZN		4,109	6,019	15,948	19,904	22,290	2,855	5,589	11,285	17,509	15,842
POTATO FZN		10,288	10,673	35,729	41,970	125,895	5,718	5,895	19,797	23,221	69,284
OTHER VEG FZN		97,500	198,818	391,350	469,967	1,671,650	7,938	9,428	30,783	31,629	88,516
Subtotal:----		129,973	227,144	507,864	570,858	1,990,268	28,175	28,712	104,976	99,252	286,869
TREE NUTS	MT										
BRAZILS TOT		355	383	2,896	2,681	10,429	567	780	4,306	5,821	15,171
CASHEWS TOT		6,312	5,618	26,252	21,871	64,377	24,978	23,847	104,489	90,500	260,328
COCONUT		4,426	5,737	21,343	24,760	59,768	3,816	4,417	17,927	19,791	49,330
PECANS		1,586	1,927	14,032	4,343	20,305	6,734	2,931	49,116	12,221	88,874
OTHER NUTS		1,116	1,166	8,795	9,148	21,106	3,821	4,391	28,279	31,055	73,209
Subtotal:----		13,797	14,834	73,320	62,806	175,987	39,918	36,368	204,119	159,390	486,914
NURSERY PRODUCTS	M										
CARNATIONS		107,014	112,862	338,146	373,127	920,969	8,967	8,484	29,407	31,235	82,772
CHRISTMAS TREES		0	0	1,988	1,986	1,995	0	0	17,254	17,041	17,286
CHRYSANTHEMUMS		11,720	58,384	49,728	168,582	159,073	5,861	6,243	21,580	25,098	66,054
ROSES		59,513	64,925	169,098	203,482	584,669	10,847	11,887	28,518	34,035	102,915
TULIP BULBS		0	0	65,749	64,784	284,022	0	0	7,859	7,804	32,959
OTHER CUT FLRS		0	0	0	0	0	8,801	10,102	33,565	37,730	106,414
OTH NURS PROD		0	0	0	0	0	19,882	20,056	78,584	79,914	215,556
Subtotal:----		178,248	236,173	624,712	811,963	1,950,730	54,360	56,794	216,770	232,860	623,959
HOPS & PRODUCTS	MT										
HOPS & PELLETS		408	1,337	1,857	2,707	3,982	2,429	9,195	8,044	16,954	22,237
OTHER HOP PRODS		1	110	1	247	134	5	644	7	1,563	933
Subtotal:----		409	1,447	1,859	2,955	4,116	2,435	9,840	8,052	18,518	23,171
WINE	KL										
RED WINE		5,354	7,050	31,419	38,212	98,370	20,981	23,304	119,968	134,776	379,584
SPARKLING WINE		1,058	1,283	14,629	15,999	29,680	8,186	9,924	113,552	130,017	251,670
WHITE WINE		3,230	6,288	35,123	34,663	92,358	8,711	17,505	114,447	103,106	279,901
OTHER WN PROD		1,309	2,073	7,388	9,357	23,752	3,335	4,638	19,015	25,700	60,012
Subtotal:----		10,952	16,695	88,561	98,232	244,162	41,214	55,373	366,983	393,600	971,169
MISCELLANEOUS	KL										
BEER & BEVERAGES		61,599	75,669	314,673	372,450	1,119,446	51,270	60,161	268,558	305,049	952,084
OTHER MISC		0	0	0	0	0	53,502	58,324	233,278	256,028	720,413
Subtotal:----		61,599	75,669	314,673	372,4						

Export News and Policy Updates

Sao Paulo orange production in 1993 is revised upward to 302 million boxes.

Orange production in Brazil's Sao Paulo state in 1993 has been revised to 302 million boxes (12.3 million tons), 7 percent above the previous forecast, but 4 percent below the 1992 harvest. The larger orange output is the result of a higher than previously estimated number of bearing trees. The processing and fresh consumption estimates for the season beginning in July 1993 were increased based on the larger orange crop estimate. Brazil's orange juice production estimate for 1993 is increased 2 percent to 1.04

million metric tons, 65 degrees brix, of which 1.02 million tons were produced in Sao Paulo (see December issue of Horticultural Products Review for previous update). Fresh orange consumption in Sao Paulo in marketing year 1993 is revised upward to 53 million boxes, or 15 million boxes above the previous year, the result of warm summer temperatures and the availability of fresh oranges to make fresh-squeezed orange juice. Brazil's orange juice export forecast is unchanged from last reported. Projected orange juice ending stocks were increased because of the higher production.

Brazil: Supply and Distribution of Oranges and FCOJ 1/

	1991	1992	1993
Oranges, Sao Paulo	Million Boxes 2/		
Production 3/	250	314	302
Fresh Consumption	35	38	53
Fresh Exports	3	2	2
Processed	212	274	247
FCOJ, Brazil	1,000 Metric Tons, 65 Degrees Brix 4/		
Beginning Stocks	126	68	105
Production			
Sao Paulo	920	1,100	1,020
Other	29	45	20
Total	949	1,145	1,040
Exports 5/			
Sao Paulo	960	1,045	1,000
Other	29	45	20
Total	989	1,090	1,020
Consumption	18	18	18
Ending Stocks	68	105	107
FCOJ Yields (kg/Box)	4.29	4.00	4.11

1/ Harvesting and processing usually begin in late April or early May. Marketing season for FCOJ begins on July 1 of year indicated.

2/ 40.8 kg. or 90 pounds

3/ Includes oranges produced in Sao Paulo's commercial citrus zone, plus tangerines and tangors used for processing.

4/ One metric ton at 65 degrees Brix equals 344.8 gallons at 42 degrees Brix or 1,405.88 gallons at single strength equivalent.

5/ Includes tangerine juice.

A new FCOJ processing plant is being built in Brazil.

The new company FRUTAX comprised of former directors from MONTECITRUS, is building a new FCOJ processing plant in the state of Sao Paulo. Total investment is estimated at \$25 million with annual sales projected at \$30 million. The new plant, which is expected to begin operation in July 1994, will have a capacity to process 6 million (40.8 kilos) boxes. Approximately 50 percent of the plant's capacity is expected to come from the orange groves of growers of the company. Although no precise information is available, total Sao Paulo state orange crushing capacity is estimated at 350 million boxes, of which 70 percent is currently utilized. Opening of the new plant will further increase competition for fruit, especially given industry processing expansion in recent years.

The Agricultural Marketing Service (AMS) started a new service for exporters.

The International Transportation Branch, AMS, USDA, recently introduced the periodical *Ocean Rate Bulletin*, which provides information on ocean freight rates for fruits shipped to Southeast Asia. This new bulletin, produced every three weeks, tracks freight rates and carrier markets shares of fresh apples, oranges, and grapes shipped to Thailand, Singapore, the Philippines, and Hong Kong. This service was implemented to give small and medium size shippers a better understanding of their transportation options, and to facilitate the export of U.S. fresh fruits throughout Asia. For questions or comments regarding this bulletin, call Kate Healey at (202) 690-2325, or fax (202) 690-1340.

Strong economic growth, more open import policies, and increased promotion efforts are increasing U.S. exports of consumer ready food to Costa Rica and Panama.

In 1992, U.S. exports of consumer ready food to Panama and Costa Rica reached record levels of \$48.0 and \$15.1 million, respectively. Fresh fruits, processed fruits and vegetables, and fruit

and vegetable juices account for more than half of these U.S. shipments. Solid economic growth, trade liberalization, and market promotion efforts (mostly from MPP funds), have been factors behind the increased growth of U.S. consumer ready food exports to these countries. Especially effective have been promotion ventures undertaken for U.S. apples, grapes, pears, and other fruits. For both countries, good prospects continue for snack foods, e.g. potato chips, grape and apple juices, new beverages, canned fruit and vegetables, fresh apples, grapes, and pears, and beer. Registration of new products takes a significant amount of time (about 3 to 6 months) in both countries. Currently in Costa Rica, food labels are required in Spanish including the product name, ingredients, weight, importer's name and address. In Panama, no labels are currently required in Spanish but, by law, foods need an expiration or production date in code somewhere on the product. Certificates of free sale are also required in Panama. In both countries, import demand is especially strong in November-December. The United States supplies about 25 percent of Costa Rica's imports of consumer ready food and a larger share of Panama's market. Chile (fresh fruits and wine) and other Central American countries (canned foods and others) are also important suppliers.

Chinese government eliminated quotas for selected fruit.

On January 5, 1994, Chinese officials removed the quota for the following 15 fresh fruit categories, including apples. This action was in accordance with the provisions under the October 1992, Section 301 Market Access Memorandum of Understanding. With exception of apples from Washington State, however, fruit imports from the United States remain officially prohibited due to a phytosanitary ban. USDA/APHIS is continuing to work with Chinese quarantine officials in an effort to reduce the number of U.S. fruits subject to this ban.

China's Imports of Fruit in 1992 and 1993

(Quantity in Metric Tons, Value in \$1,000)

<u>Type of Fruit</u>	1992		1993	
	<u>Vol.</u>	<u>Value</u>	<u>Vol.</u>	<u>Value</u>
Oranges, fresh	65	47	219	105
Lemons, limes, fresh or dried	101	56	59	26
Grapefruit, fresh or dried	<1	3	<1	2
Grapes, fresh	20	67	na	na
Grapes, dried incl. raisins	1,889	1,634	na	na
Watermelons				
Hami melons				
Other melons	174	108	na	na (all melons)
Apples	671	710	1,049	1,329
Ya, Hsueh, or Xiang pears				
Other pears				
Quinces	16	26	43	61 (all pears)
Cherries	3	8	3	6
Plums and sloes	2	4	13	9
Strawberries	<1	3	na	na

Source: China customs

Guatemala's licensing system for apples will soon be removed.

Guatemala's current licensing system for apple imports stipulates that importers must apply for a license to import apples between January 1 and June 30. As was negotiated for Guatemala's accession to the GATT, the licensing system will be removed by June 30 of this year. Barring an increase in the tariff from its current 20 percent, U.S. apple sales to Guatemala have a strong potential to increase.

About 60 percent of apples are sold at Christmas time. Last year, much of the domestic apple crop, which is harvested from July to October, was stored until December. The apples, which apparently have a good flavor but a poor appearance, stored badly and were displaced by imports. Apple imports are especially likely to increase in 1994 if domestic apples are not stored until the Christmas season.

Red Delicious is the preferred variety with approximately 80 percent of sales. The remainder of the market is split about evenly between Granny Smiths and Golden Delicious. Medium sizes (100-125) and high quality (extra

fancy) are preferred. If sales increase when the licensing system is removed, sales in supermarkets, where apples are sold year-round, will see an immediate increase. Street sales, which occur mostly in December when sales skyrocket, should grow more slowly, eventually capturing a larger share of the market. When licensing is removed, apple sales may partially displace the relatively smaller market for Anjou pears, which also are mainly sold around Christmas time.

Guatemalan importers are very pleased with U.S. apples. Washington apples reportedly represent 70 percent of imports from the United States, and are reportedly higher quality and packed better than Chilean and French apples. French apples are imported during January and February and Chilean apples from March until June.

Polish potato production makes huge jump as crop recovers.

The 1993 potato crop in Poland reached 36.3 million metric tons, up 55 percent from the drought-reduced 1992 crop. It is the largest crop since 1987. Yield was up sharply to a record

20.6 tons per hectare. Most potatoes are grown on light soils with little fertilizer used and almost no pesticides or supplemental irrigation. Potatoes are grown throughout the country, with concentrations in eastern and central Poland.

On-farm consumption usually utilizes 70 percent of production, while only 17 percent goes into fresh market and processing channels. Because of antiquated storage technology, annual losses range from 13 to 15 percent.

Most of the crop is used to feed hogs. Feed consumption was over 20 million tons in the late 1980's, but fell to 9.3 million tons in 1992/93 because of the short crop. It is expected to recover this year to 18 million tons.

Half of Poland's potato processing industry is for the production of spirits - 1.5 million tons per year can be made into vodka. Starch production utilizes 1.2 million tons, dehydrated potatoes utilize 180,000 metric tons, chips utilize 70,000 tons, and french fries utilize 63,000 tons each year.

Poland is a significant exporter of fresh potatoes, ranging from 704,300 tons in 1990 to 1.163 million tons in 1991. Exports fell sharply in 1992/93 to 714,000 tons because of the drought conditions. Exports are expected to recover to 1 million tons in 1993/94. Small amounts of potato starch, dehydrated potatoes, and french fries are both imported and exported each year.

Romania increases potato production nearly 50 percent in 1993, and reduces dependence on imports.

Total Romanian fall potato production in 1993 was 3.354 million metric tons, up 44 percent from 1992 production of 2.329 million metric tons. Yield, at 15.4 tons per hectare (6.23 tons per acre) was up 27 percent from 1992. The private sector accounts for 92 percent of Romanian potato production, the highest level of private farm participation of any major commodity.

Romania is a net importer of fresh potatoes. Total fresh potato imports dropped to 75,029 tons in 1993 from 262,903 tons the previous year. While 1993 exports are not available, in

1992 Romania exported approximately 5,000 tons.

The U.S. Floral Trade Council (FTC) has filed an anti-dumping petition against imports of fresh cut roses from Colombia and Ecuador.

On February 14, 1994, the U.S. Flower Trade Council, with the support of Roses Incorporated, filed an anti-dumping petition with the International Trade Administration (ITA), U.S. Department of Commerce, and the International Trade Commission (ITC) concerning fresh cut roses from Colombia and Ecuador.

The petition alleges that sales of Colombian and Ecuadorian roses in the United States at less than fair value cause or threaten to cause material injury to the domestic industry. The petition defines the domestic industry as the fresh cut rose commercial greenhouse industry. Fresh cut roses include sweetheart (miniature) roses, spray roses, and hybrid tea roses (including intermediate roses), whether as stems or bunches.

According to the FTC in the petition, surges of low-priced, imported roses from Colombia and Ecuador in recent years have devastated the U.S. domestic industry. The number of imported Colombian roses have increased dramatically in recent years, far exceeding the rate of growth of the market or of other foreign supplies

According to the FTC, Colombian and Ecuadorian rose imports are estimated to have accounted for 46.6 percent of the apparent U.S. consumption of roses in 1993. Domestic U.S. rose production has declined in recent years.

On March 28, the U.S. International Trade Commission voted in a preliminary ruling that fresh cut roses allegedly dumped here by Colombia and Ecuador are a threat to U.S. industry, opening the way to an investigation by the International Trade Administration.

In calendar year 1993, U.S. imports from Colombia and Ecuador accounted for 85 percent of the total value of imports. This combined percentage was up 21 percent from 1992.

Alone, Colombia accounted for about 75 percent of the total U.S. import value in 1993.

**United States: Imports of Fresh Cut Roses, Calendar Years 1989 to 1993
(\$1,000, fob)**

<u>Origins</u>	<u>1989</u>	<u>1990</u>	<u>1991</u>	<u>1992</u>	<u>1993</u>
Colombia	56,416	62,960	67,543	66,855	80,312
Ecuador	4,349	4,790	5,884	8,422	10,917
Mexico	7,186	10,366	10,775	6,882	8,172
Guatemala	2,540	2,978	3,492	4,924	4,866
Others	4,821	4,944	4,000	3,359	3,125
Total World	75,312	86,038	91,694	90,442	107,392

Source: Bureau of the Census, U.S. Department of Commerce.

India has increased the import duty on in-shell almonds.

On March 1, the Government of India increased the duty on in-shell almonds from its bound level of 55 Rupees(Rs.)/kilogram(kg.) to 60 Rs./kg. At the same time, the tariff on shelled almonds was reduced 20 percent from the current level of 100 Rs./kg. to 80 Rs./kg. The tariff adjustments threaten to harm U.S. trading interests by shifting Indian purchases away from in-shell almonds, which account for the bulk of U.S. almond exports to this market, to the shelled product, much of which is sourced from Iran, Pakistan, and Afghanistan. The United States Government has requested the Indian Government to rescind the tariff hike on in-shell almonds and to restore the ratio of shelled to in-shell duty rates specified in a 1992 letter of understanding between the two governments. U.S. exports of almonds to

India in calendar year 1993 were valued at \$19 million, with in-shell almonds accounting for nearly 70 percent of the total.

GSM-102 applications for hops to Mexico rise.

Since last month's report, U.S. hops exporters have applied for \$600,000 of coverage under the GSM-102 credit guarantee program. Last month Mexico received authorization for an additional \$4.5 million of coverage for hops under the program, bringing the total value of coverage available for hops to \$6.0 million for FY 1994. The additional registration of \$600,000 boosts the total amount of coverage to \$2.6 million this year. Apart from this, there was no other horticultural activity under the program during the reporting period.

FY 1994 GSM-102 Credit Guarantee Coverage 1/

<u>Country/ Commodity</u>	<u>Announced Allocations FY 1994 (\$1,000)</u>	<u>Exporter Applications Approved (\$1,000)</u>	<u>Balance (\$1,000)</u>
Colombia			
Fresh fruits 2/	500	0	500
Tree nuts	500	0	500
Indonesia			
Potatoes 3/	2,000	0	2,000
Mexico			
Almonds	1,000	0	1,000
Fresh fruits 2/	1,000	0	1,000
Hops	6,500	2,600	3,900
Tunisia			
Almonds/Walnuts	500	0	500
Raisins	500	0	500
Turkey			
Potatoes 3/	5,000	0	5,000
Venezuela			
Fresh Fruits 4/	2,000	0	2,000

1/ Coverage through March 25, 1994.

2/ Apples, pears, plums, peaches, nectarines, and strawberries.

3/ Cut for french fries.

4/ Apples, pears, plums, grapes, cherries, and peaches.

Australia's Horticultural Industry and the Competition Outlook in World Markets

Australia is a major competitor to the United States for the large and growing horticultural market in southeastern Asia. The wine industry is very strong, and an important competitor in the United Kingdom, other European markets, and Japan. Citrus and deciduous fruit industries are also large and increasing exports. Other large horticultural exports include dried fruit (sultanas) and macadamias. Australia is also an important market for U.S. horticultural exports for certain market niches, including some reverse-season markets for fresh produce. For the foreseeable future, Australia will continue to be an important competitor to the United States for many horticultural commodities, particularly wine.

Overview of Australia's Horticultural Industry

Australia has a well-developed horticultural industry. Like in the United States, some sectors are more advanced than others, both technically and in export marketing expertise. Wine is the most advanced; the deciduous tree fruit and dried vine fruit industries are relatively inward-looking and static. Citrus is becoming less inward-looking, and rationalization and increased plantings will continue to create further efficiencies.

The entire horticulture complex accounted for roughly 17 percent (A\$3.5 billion)¹ of total agricultural production by value in 1991/92, according to the Australian Bureau of Statistics. This was roughly the same as the beef (A\$3.7 billion) or grain (A\$3.2 billion) industries.

In terms of annual gross value of production (all figures are 1992/93 estimates by the Australian Bureau of Statistics), fresh grapes take first place among fruits, at A\$398 million per year, followed by bananas at A\$298 million, and apples, at about A\$215 million. Oranges are

fourth with about A\$205 million, followed by pears (A\$100 million). These are the only fruit commodities with annual values of production at over A\$100 million.

Among vegetables, potatoes rank number one, at A\$317 million. After that, tomatoes are the only other vegetable (A\$160 million) with a value of production over A\$100 million. Total nursery production is significant, at A\$569 million.

Wine is the single largest horticultural export item, with values exceeding \$A300 million. Fresh citrus exports are second at A\$80 million, followed by sultanas (raisins), at A\$70 million. Total fresh deciduous tree fruit exports (pear, apple, peach, etc.) exceed A\$80 million. Fresh grape exports total A\$40 million.

While most Australian processed horticultural product exports go to European or North American markets like the United Kingdom, Germany, and Canada, fresh fruit exports typically go to Australia's neighbors in Singapore, Malaysia, Hong Kong, and Indonesia.

Government Assistance

Government assistance to horticulture takes many forms and is decentralized compared to the United States. The state governments provide most of the support, with New South Wales

¹ All figures shown in this article are in Australian dollars. The current exchange rate is U.S.\$1.00 = A\$1.40.

alone giving A\$19 million in 1990/91.

There are seven separate federal export assistance programs, with direct annual payments exceeding A\$10 million. Given the relative size of its horticultural exports, the Australian state and federal governments provide a higher degree of export promotion assistance than does the United States. Two of the largest programs are run by Austrade, the Australian Government's export promotion agency. The largest program, the Export Market Development Grants (EMDG) plan, provided A\$7 million to horticultural exporters in 1992. \$A1.7 million in promotional funding for horticultural products was also disbursed through the Innovative Agricultural Marketing Program, also run by Austrade.

Another program, the International Trade Enhancement Scheme, provides up to A\$2.5 million in soft loans, at annual interest rates of 1½ to 2 percent. If the exporter is not successful, the loan is often forgiven. The Marketing Skills Program, provides over A\$1.5 million each year to "develop quality assurance schemes and organizational structures to bring growers together into export groups."

Australian Horticultural Corporation

The Australian Horticultural Corporation (AHC) is a federal chartered corporation, mandated to promote Australian horticulture, domestically and in the export market. (There is a similar organization for the wine industry, the Australian Wine and Brandy Corporation or AWBC.) It covers all the fruit and vegetable industries. Industries voluntarily join, and activities are paid by grower levies. The major industries in it are citrus, apples, pears, and avocados. No vegetable industries belong. One-third to one-half of all horticultural products are in the AHC. The AHC also has a research arm, in which the potato, mushroom, and tomato industries participate.

The AHC provides many services. It tries to improve the market structure and organization. It also promotes exports. It has developed industry-specific programs for exporting: quality assurance and brand marketing are two mechanisms used.

The AHC is working to improve trade and consumer recognition of Australian produce in four principal export markets: Singapore, Malaysia, Hong Kong and New Zealand. Importers, distributors, and retailers are encouraged to trade in Australian produce. Consumer promotions include store level activity and advertising in the general media. Enhancing the "Clean green" reputation of Australian produce will be continued.

Another program in the works is creating a single identification for Australian produce. "Australian Produce Identification" or API will assure quality standards, and conduct advertising, promotion and product identification. An Australian logo will be used on high quality produce, in the hopes that consumers will pay a premium. The citrus industry has already endorsed the program, which will start in 1994/95.

The AHC acts to improve communication within the same industry throughout the states, which in the past tended to be insular. It has pursued market access issues, such as importing Riverland citrus into the United States.

AHC also organizes promotional programs, both domestically and in overseas markets. There was recently a very successful domestic promotion for apples. New varieties, including the Pink Lady from Western Australia, were part of the promotion.

Wine

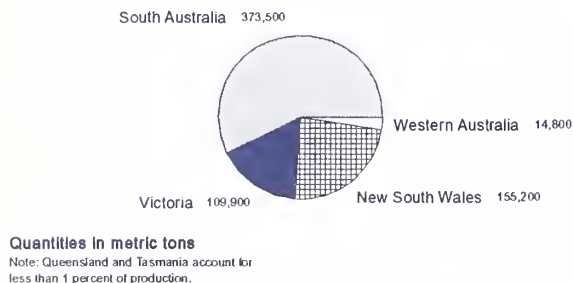
Wine is Australia's premier horticultural growth industry. Australian wine exports were over A\$300 million per year (U.S.\$210 million) in 1993; the industry plans to export A\$1 billion by the year 2000. At current growth rates, they will reach that goal by 1998. (See production, supply, and distribution table on page 23 for quantities.)

Structure of the Industry

The industry is well-organized, with clearly defined relationships for the private sector and government in the areas of research, market promotion, government relations, product quality control, and other issues.

The industry has undergone a great deal of

South Australia is the Leading State in Wine Grape Production



restructuring and streamlining. While there are over 700 wineries in Australia, four companies account for about three-quarters of production, and an equal amount of exports. The top 12 have perhaps 90 to 95 percent of the market. The other 700 or so have the rest.

While production takes place in each state, most of it takes place in the southeastern states of South Australia, Victoria, and New South Wales. Most state governments actively support their wine industries. In the past few years, production has doubled in Tasmania and Queensland, two states with relatively little production.

There are seven major varieties of red grapes planted for wine production, listed in order of current bearing acreage: Shiraz, Cabernet Sauvignon, Grenache, Pinot Noir, Mataro, Merlot, and Ruby Cabernet. There are fifteen major varieties of white grapes: Chardonnay, Riesling,

Australian Wine Grape Growing Regions



Muscat Gordo Blanco, Semillon, Sultana, Trebbiano, Palamino and Pedro Ximenes, Sauvignon Blanc, Columbard, Doradillo, Chenin Blanc, Traminer, Muscadelle, Frontignac, and Crouchen. 1992 bearing acreage for red grapes was 7,430 hectares; for white grapes it was 15,350 hectares.

Production is forecast to increase over the mid-term, in both white and red varieties. Chardonnay is expected to increase the most, more than doubling by 1995/96 over a 1989-to-1992 base period, according to the Australian Bureau of Agricultural and Resource Economics (ABARE). A drop in non-premium varieties, such as Doradillo and Palomino is expected. For red wine varieties, ABARE expects Cabernet Sauvignon, Shiraz, and Pinot Noir to have the greatest increases.

Capital needed for new processing facilities and plantings is the limiting factor. Land is cheap and readily available. Water is also available. Plantings of premium-wine grape varieties have increased markedly, but it is unclear if they will meet future demand.

One constraint to increasing production is the relatively small size of agricultural holdings in the wine-growing areas. These areas were settled and developed immediately after World War II, deeded to veterans on concessional terms. Usually in lots of 40 acres, these farms often have several horticultural products being raised: some citrus, deciduous tree fruit, and grapes.

Australian wine consumption, estimated at 325 million liters, or 19 liters per capita, has been trending down over the past several years, with the exception of an increase in 1992. The mix in consumption is changing, away from bulk wines. Premium wine consumption is increasing at a faster rate than other types. Chardonnay-type grape usage in wine is increasing, while sultana-type grape usage is static.

One reason for the decline in domestic consumption has been an increasing excise tax on wine. This tax increase, from 11 to 22 percent, is being phased in over five years.

Exports

The major export markets include the United Kingdom, New Zealand, Sweden, the United States, Canada, and Japan. (See chart on front cover.) Germany and Switzerland also are significant markets.

In 1992/93, exports accounted for one-quarter of total sales, or 103,000 kiloliters of 415,000 kiloliters total sold.

How Australian Wine Competes (And Does So Well)

Why is the Australian industry doing so well? Four key reasons are: 1) long term commitment; 2) simple labeling; 3) low land prices that give Australia a price advantage; and 4) historical and cultural ties to some markets, specifically the United Kingdom, New Zealand, and Canada.

Still there are obstacles and constraints. The unit value of exports has declined, from \$3.40 per liter in 1992 to \$2.80 in 1993, largely because of an increase in bulk sales to Sweden. Tax increases in the United Kingdom have also cut into the increased sales to that market. Chile and South African producers are taking advantage of price increases some Australian producers have made.

With regard to its principal export market, the United Kingdom, there are important ties - social, cultural, and governmental - that give Australia a unique advantage. Australian industry observers believe that Australia was in the right place at the right time -- when France was paying little attention to the U.K. market. The Australian companies have a high quality wine for every price point in the U.K. market.

There is still room to expand in per capita consumption in the U.K. market. Another reason for the success of Australian wine in the U.K. market is that it is displacing sales of French wine. It is less expensive and relates better to English wine-drinking tastes than does French wine, according to Australian exporters.

The English consumer (like the American) is often a "buy and drink" purchaser. That is, wine is bought for consumption in the near future, rather than for storage and consumption a few

years later. Few consumers have cellars.

Australian wine is simply labelled, in a manner easily intelligible to British consumers, in contrast to the complex systems required by Germany or France.

Australia has a major cost advantage over most other producers. Land is much cheaper in Australia, as little as one-tenth the cost of comparable land in California or France.

The cultural and historic links with the United Kingdom, through the Commonwealth, and by having a shared language and "New World" nature like the United States, are also important. With the United Kingdom, the Commonwealth and continued immigration from there provide a link that no other major exporter to the United Kingdom can duplicate. In the United States, similarities in technological processes and labeling for wine making make Australian wines much more accessible to the American consumer.

Many Australian wines that sell well in German markets are out of the Barossa Valley, north of Adelaide in eastern South Australia. This area is settled by German descendants, and there they produce some of Australia's best wines. Many German-type wines are produced, including Rieslings and Traminers. Another advantage that Australia has in the German market is the German perception that Australia has a pristine and uncontaminated environment.

Asia has been a relatively difficult market for Australia. In general, consumers there think of wine as a European invention, and look to European wines as the standard.

Export Promotion

Market promotion is done mostly by individual wine companies, but AWBC does do some generic promotions overseas. Austrade provides funding which is also matched by the industry. The Australian Wine Export Council (AWEC) is a semi-independent committee of the AWBC. AWEC membership comes from the major wineries as well as smaller wine makers.

Shown below are the promotional funding levels for wine export promotions by the Australian Wine Export Council:

<u>Country</u>	<u>1992/93</u> <u>\$A1,000</u>	<u>1993/94</u> <u>\$A1,000</u>	<u>Percent</u> <u>change</u>
United Kingdom	632	915	+44%
United States	320	700	+119%
Sweden	26	93	+258%
Rest of Europe	20	63	+215%
Japan	170	226	+33%
Total	1,168	1,997	+71%

One marketing activity the Australian industry sponsored was to take 100 U.K. wine buyers and 10 wine journalists to Australia to see the Australian industry firsthand. As a result of this effort, some buyers doubled their purchases of Australian wines.

Government Involvement

One aspect of government involvement in the wine industry is the Australian Wine and Brandy Corporation, or AWBC. Its purposes include ensuring efficient production and assisting structural adjustment. The industry is relatively unregulated (with the exception of the NSW state board); however, there is semi-regulation through the use of an "indicative pricing scheme." In this scheme, the grape growers and wine makers meet once each year to exchange information on the situation. Demand and supply for the various varieties, export outlook, and other factors are discussed. From this laying of the cards on the table, indicative prices are set by variety.

The AWBC is a federal corporation, which has two statutory responsibilities: 1) to increase demand through higher domestic consumption and higher exports; and 2) to exercise export control through licensing arrangements. Licensing requires passing two tests: 1) the wine must be of sound and merchantable quality as defined by the AWBC; and 2) it must meet foreign import requirements for labeling and composition.

There is a research arm, the Grape and Wine Research and Development Corporation, which does research for wine grape production, as well

as wine-making technology. Matching funding from government and industry pays for this research.

Australia/European Union Wine Agreement

In late 1992, the European Union and Australia reached agreement on a number of technical issues related to trade in wine. This came after at least five years of bilateral negotiations. Many Australian industry observers feel that this is a win/win situation for both the Europeans and Australians. Australian producers were already going away from names like "Champagne" and "Chablis." As a result of Australia's increased exports, the importance of the EU market was continually growing. It was prudent for Australia to secure that market.

The 12,000 geographic appellations of the EU will be protected in Australia as a result of the agreement. Australian brands will have to remove appellations like the ones mentioned above, as well as others like "Port."

The Europeans will agree to abide by Australian standards, and remove technical barriers to trade.

Such Australian practices as having up to five varieties listed are allowed; Australian practices that were previously forbidden, like acid adjustment, are now allowed. (Because of higher sunshine, the Australian industry has acid problems, typically requiring acid adjustment. This was considered adulteration by the EU prior to the agreement.)

Ascorbic acid and erythorbic acid are also used by the Australian industry, and are Codex approved. However, the EU did not allow this until the Agreement was reached.

The accord was formally signed on January 31, 1994, and went into effect on March 1, 1994.

Citrus

Citrus is the third most important fruit crop in Australia, after grapes and bananas. Production is mostly for domestic consumption, but the industry is starting to see the importance of exports in its overall strategy.

In 1992/93, ABARE reported that citrus production in Australia was as follows: navel oranges, 187,000 tons; Valencias, 421,000 tons; total oranges, 608,000 tons. Total citrus production, including lemons, limes, grapefruit, and mandarins, was 727,000 tons. 70 percent of Australian production takes place in the Murray and Murrumbidgee River areas of New South Wales-Victoria-South Australia. (See production, supply, and distribution table on page 23 for quantities.)

In this area, very little rain occurs - about 330 millimeters per year (about 13 inches). Most water comes from irrigation, which comes from the Murray River. Water is very inexpensive, and the irrigation infrastructure is run by the state governments.

Drip irrigation, which is more efficient and causes less salinization of the soil, will become more widespread in the industry. In the Riverland area, the change to drip irrigation is a necessity as salt is a very serious problem there. In Mildura, the water is less saline, but the need to change over is there. In Mildura, much irrigation is still overhead.

More new plantings are the navel varieties, yet Valencias still outnumber navels by about two to one. The new varieties have much better quality fruit than before. Also, varieties that produce bigger size fruit are being planted.

Grapefruit is only about 3 percent of total citrus production. Red varieties, popular in the United

States, are not grown in South Australia. There are marketing problems related to lack of consumer knowledge of the product, as well as processing (the juice when processed is an unattractive color).

Lemons make up about 12 to 15 percent of production. Some are exported to Hong Kong.

For mandarins, Imperial, an early variety, is very popular. Mandarins and other tangerine-type varieties account for about 12 to 15 percent of production.

Processing accounts for about one-half to three-fifths of fresh production, depending on the total amount produced each year.

For the citrus industry in general, the trend is toward larger land holdings. The size of citrus operations has more than tripled in the last ten years, from about 6 to 20 hectares (still small by U.S. standards). Consolidation of the industry will continue.

Australian citrus production is already well on its way toward the FAO-cited projection of 716,000 metric tons by the year 2000. Production will continue to increase for the foreseeable future, brought on by higher domestic consumption and exports. It is expected that most of those exports will go to Asian markets, along with some further opening of the North American market.

Production will increase as recently planted trees start to bear and as younger trees mature.

Australian navels are in season from March to September. Valencias are on the market from September until March or April.

Juice Industry Improving

In Australia, grower returns from juicing operations have been a real problem. Australian juice processors are less efficient than American processors, and grower returns are relatively low. Growers get only A\$40 per ton of fresh fruit for juicing, when the cost of production would be about A\$140 per ton.

The tariff for FCOJ in Australia is very low (most comes from Brazil, which gets preferential

Australian Citrus Production Areas



treatment), and the Government has not been willing to raise the tariff to increase returns. Instead, it gave AHC \$2 million to promote consumption. Most of this effort went to promote single strength juice, while some went to promote fresh oranges for juicing. As a result of this effort and an ongoing "Buy Australian" campaign, single strength juice sales have climbed to 37 percent of the market.

How Australian Citrus Competes in Asian Markets

Australia currently ranks among the top 15 fresh citrus exporters in the world, and the most significant competitor to the United States in the growing Asian market. Total fresh citrus exports are projected to increase dramatically, from about 85,000 tons in 1992/93 to 145,000 tons by 1998/99. Fresh exports go primarily to Indonesia, Malaysia, Singapore, and Hong Kong. The United States is a new market for fresh citrus, as Australia began reverse season exports there two years ago. Little juice is exported.

There are many Australian brands in the marketplace in Asian countries, and the Australian product identification is very weak. There is significant and very cutthroat price competition among Australian shippers. Many in the industry feel there is a very strong need for a single brand identification in these markets, but one has not been used in these markets.

One test market of a single brand has been done. Called "Clean Australian Food," it is a generic, multi-product effort that emphasizes the clean Australian environment and growing and packing conditions. In many Asian markets, Australia is perceived as a pristine environment, with little damage to the eco-system or artificial chemicals added to the soil. This brand identification plays on those feelings. (See section on the AHC, page 13.)

U.S.-Australian citrus trade

California citrus enters Australia from the end of December through March. California navels enter the market before the Australian harvest begins and are price-competitive with local Valencias. Because Australia is a net exporter of lemons and juice, there is no demand for U.S. lemon juice. There is a window for U.S. exports

of fresh lemons in July and August. Efforts are also underway to allow Florida grapefruit to be exported to Australia.

Australia also exports to the United States. Navel exports under one single "Riversun" brand identification - a single desk exporter - have been going to the United States successfully for two years. The Riversun brand product comes from Riverland and Sunraysia, two citrus growing areas near each other in the north Victoria/east South Australia growing areas.

Exports have doubled in the second year over the first year, but a rind pitting problem has required shippers to repack to meet U.S. quality standards.

Deciduous Fruit

Deciduous tree fruit orchards are located primarily in Victoria, New South Wales, and South Australia. Apples are biggest in terms of volume of production, but fresh pears are the largest in exports. Processed products are also important for exports. Preliminary estimates by ABARE show canned pear exports at A\$45 million, followed by fresh pears (A\$39 million), fresh apples (A\$37 million), and canned peaches (A\$23 million). (See production, supply, and distribution table on page 23 for quantities.)

In the near future, exports of fresh and processed deciduous tree fruits will likely remain static. Relatively slow upgrading of varieties, a fragmented organizational structure in the industry, and unwillingness to become more export-oriented are impediments to higher exports. While these are being overcome, Southern Hemisphere competitors like New Zealand, Chile, and South Africa have already made many of the changes Australia is just now beginning to make.

The processing end of this industry has seen some rationalization in the past few years, as one major canner has recently closed, and another is on the brink of a major reorganization.

Much of the deciduous fruit grown in Australia is in and around Shepparton, in northern Victoria. The low rainfall in this area and consequent dependence on irrigation for water has its positives and negatives. The key positive

features are reliability of supply and relatively low cost.

Negatives relate to leaching of chemicals and salinization. Acidification caused by improper usage of nitrogenous fertilizers is one problem. Increased salinity is another. As a result, Reduced Deficit Irrigation, or RDI, is being implemented.

Saltwater intrusion into groundwater sources has become a major concern in northern Victoria and South Australia. New planting methods and practices are, on the other hand, increasing yield and quality of fruit. While pear production is stagnating, peach, nectarine and apple production are trending up.

Canned deciduous fruit stocks are declining. Still, prices are not increasing, but remaining the same. The industry is relatively constant now, with little expansion.

Apricot and peach production in 1994 are down (apricots down significantly to 24,000 tons from 33,000 tons in 1992/93; peaches to 58,000 tons from 60,000 tons in 1992/93) due to rain and a bad fruit set. Yields of early varieties were not affected, as they were harvested before the rain. Intakes of peaches and pears were off slightly. Apple production (mostly in northern Victoria) is stable, with output estimated at 321,000 tons.

ABARE anticipates that production of apples will rise gradually over the next few years to 349,000 tons by 1998/99. Pear production will remain static at around 175,000 tons. Apricot and peach production are set to rise by 1998/99 to 71,000 tons for peaches, and 36,000 tons for apricots.

There are three major fruit canners in Australia, one of which is in receivership. This has caused uncertainty among the growers in that area.

In general, deciduous fruit farmers can be divided into three groups: small, medium, and large. Small producers can handle the troughs in prices by having "free labor." Because they are family-run and hire no outside labor, their expenses are low. These producers typically have 40 acres or less.

Medium-sized producers, who typically may have as many as four full-time staffers, have much higher overhead and can least handle low prices. They are the firms being rationalized.

Larger firms, which are more professionally run and have developed economies of scale, have low costs. They can also cross-subsidize low returns in a given year by related services - consultation, irrigation services, management consulting, etc.

Consumption is static to increasing for tree fruit in Australia. A "5 a day" campaign was started in 1993, and has the support of the Heart Foundation and other Australian health organizations.

Southern Hemisphere countries like South Africa, Chile, and Argentina are the major competitors for Australian fresh tree fruit. Many industry leaders feel that Chile is the most aggressive competitor. Several explanations were given. Chile has good quality, and has more quickly planted popular varieties. They also have more modern infrastructure, and shipping costs are lower. The Australian shipping company, the Australian National Line, is not a significant player, has irregular shipping schedules, and has higher costs.

For fresh fruit exports, there are some quarantine issues. While there is no fire blight, there is a problem with light brown apple moth, an insect pest that affects many deciduous tree fruits.

Several hundred thousand cartons of canned fruit go to Malaysia each year. Marketing in Japan has been successful by participating in the school lunch program there.

Because the U.S.-Canada Free-Trade Agreement is lowering Canadian tariffs on U.S. canned fruit, the United States is able to more effectively compete against Australian canned fruit. As a result, Australia is losing one of its most important export markets. CANATA, the Canadian - Australian Trade Agreement (which pre-dates the U.S.-Canada Free-Trade Agreement), provides preferential tariff treatment for Australian canned fruit exports to Canada. Australian exporters believe the agreement is supposed to provide Australia with tariff treatment no less favorable than the treatment

granted to any other country. But Canada, which will completely eliminate its tariffs for U.S. canned fruit, has not offered similar concessions to Australia.

Pears

Pears were the first tree fruit planted in the Shepparton area, and are still the most popular. Some trees that are 100 years old are still in commercial production. Canning pears have a relatively long season - about three months. Bartlett Williams is the most popular canning variety; Packham is the most popular fresh pear.

More red and brown varieties and varieties targeted to Asian tastes are being planted.

In Hong Kong, Packham pears are the major competition to U.S. pears. Special pricing and promotional activities are used to promote sales. A small amount of pear exports are air freighted to Singapore.

Because of phytosanitary concerns, exports are prohibited to such potentially lucrative markets as Japan, Taiwan, Korea, and China.

Apples

In the Goulburn Valley, new varieties that will put product on the market for more of the season (late varieties) are being planted. Growers are reluctant to pull out Granny Smith, one predominant variety, so the variety shift is gradual.

Malaysia was the largest export market in 1993, with 10,143 tons, followed by Singapore (9,660 tons), Philippines (4,430 tons), and Indonesia (2,965 tons). Australian shippers have been trying to gain access to Japan for Granny Smith apples for over 20 years. Cold treatment may ultimately be the system allowed by Japanese plant health authorities, but exports to Japan are not expected any time soon. Other markets currently prohibiting imports of Australian apples include Taiwan, Korea, and China.

For apple exports to Northern Hemisphere countries, cold storage is needed for phytosanitary control.

Peaches

For fresh varieties, Golden Queen is the best suited and most popular. Its downside is a relatively short season - only two or three weeks. Other later ripening varieties allow a longer season, which now lasts two to three months.

For canning, Coulbourn is the most popular variety. A new canning variety, the 200 Tatura series, is starting to be planted. The trend for processed peach production is downward.

Strawberries

Strawberry production in Australia has skyrocketed in the past few years. Strawberries are grown in every state, with most grown in Victoria, Queensland, and New South Wales. More earlier and late-developing varieties have been planted, further shortening the window when no domestic strawberries are available. Most strawberries are marketed within the state in which they are produced, with the exception of Queensland, which ships early varieties to other states.

Victoria accounts for about 30 percent of total Australian production; Queensland another 30 percent. Yields can be as high as 75 tons per hectare.

In Victoria, there are about 500 hectares in production, and production has doubled in the last five years.

Salinity is a problem for strawberry production in Victoria, and this marketing year, flooding around Shepparton was a problem.

Production for 1994 is expected to increase again as new plantings come on-line. As a result, grower returns were barely positive for this year, and will likely be negative overall in the coming season.

As a U.S. export opportunity, Australia is becoming less favorable. Transportation infrastructure in Australia is not developed well enough to provide for the efficient and quick transport of such a highly perishable commodity as strawberries. While trans-pacific transport may just be 16 hours and inspection and

customs clearance another four hours, transportation within Australia, to markets other than Sydney, the port of arrival, can be two days or more. This can be a serious detriment to such a delicate product.

With the increased production, longer season, relatively poor transportation, and lower prices in Australia, U.S. exports have been constrained. The U.S. window has narrowed to July and August.

Sultanas

The sultana (raisin) industry in Australia is one of the oldest and most established horticultural export industries, with large exports since World War I.

The 1991/92 crop was a record. There is normally a 2-year production cycle, so the downturn in 1992/93 production was not unexpected. Furthermore, a wet summer caused downy mildew, resulting in difficulty while drying. This may well be advantageous to prices, as beginning stocks were at record levels. With lower production, stocks have been drawn down, reducing supplies to more normal levels.

Production on the average is expected to remain around 60,000 tons for the near term. Higher yields, not more plantings, will help production remain at this level.

Producers are paid under the pool system in Australia. Once standards for domestic and export grades are met, then growers are paid on the quality of the product, based on inspection.

Most dried vine fruit exports go to the EU and Canada. There is no government market intervention. Recently, the industry has made serious efforts at improving quality, mostly because import protection had been lowered. A few years ago, imports from Turkey and Iran increased significantly as tariffs dropped. While this product was lower quality, the industry was anxious as imports surged from about 1,500 tons in 1988 to 8,000 tons in 1990/91. One major cereal producer and sultana user decided to source its sultanas solely from imports, as the price was so much lower.

The Australian industry's quality improvements

paid off, as imports have dropped back to about 4,000 tons per year. That cereal producer now sources its sultanas domestically again, because of those industry improvements.

The dried vine fruit industry hopes to keep area planted the same, and by improving yield through improved varieties and cultural practices, increase total production. The wine complex is both a competitor and a source of demand. Sultana grapes do not go in the premium wines, but demand for wines does affect pricing. The variety used (not Thompson Seedless as in the United States) can be used for the table wines.

The Australian Dried Fruit Board is the umbrella organization for sultana marketing in Australia and export markets. In 1993, it spent A\$1.4 million on promotion, which included an A\$250,000 grant from the Australian Export Market Development Grant program. Major expenditures were in Germany, Canada, the United Kingdom, and New Zealand, which account for 85 percent of exports.

A single export logo-quality seal used in Germany, the United Kingdom, and Canada has helped maintain sales. Also in Germany, the Sunberry brand was recently introduced to the retail and bakery trade.

One factor that will affect the Australian dried vine fruit industry in the mid-term is the explosive growth in the wine industry. Even though new plantings predominate in premium wine varieties, there is still expected to be a relative shortage of multi-purpose grapes for wine-making purposes. This may divert production from dried sultanas to wine-making.

Prunes

The dried prune industry is very stable, with few changes in the last 20 to 30 years. Exports are nearly zero. Production ranges from 2,500 to 4,000 tons, while consumption ranges around 3,000 tons each year. Imports come from the United States and Chile.

Production technology is good, with most growers using the latest varieties from France. The Australian industry keeps in touch with the French and U.S. industries.

Where the industry is lagging is in processing technology. Dehydration facilities need upgrading, and there are only three machines in Australia that do pitting, using a relatively old technology.

Production takes place near Young, about 350 kilometers southwest of Sydney, and Griffith, about 600 kilometers southwest of Sydney.

Macadamias

Macadamias are native to Australia and are grown in Queensland, near Cairns. They are also grown around Bundaberg, near Brisbane, and Lismore. Australia is the second largest producer in the world, after the United States (Hawaii).

Production has increased dramatically in the past decade, from 1,700 tons in 1982/83 to 10,963 tons in 1992/93. Production is expected to increase further, with additional plantings maturing, and higher yields from existing plantings.

In marketing year 1992/93, most exports went to the United States (4,311 tons in-shell), followed by Hong Kong (1,527 tons in-shell), and Japan (1,116 tons in-shell).

The Australian macadamia industry has undergone dramatic changes in the past few years. One major processing firm has gone through a management buyout. The resulting uncertainty in the market caused prices to plummet. This situation has since calmed with more stable prices, but many smaller producers were seriously hurt.

Of all exports, 85 percent of macadamia nuts are shipped in-shell. Because the industry is still relatively small with few processors, it is tightly controlled. There are 6-7 processing plants, with some value added. Because processing facilities are not near the production areas, costs are relatively high. (Domestically, roasted and chocolate covered macadamia nuts are available at any retail shop. Retail prices, however, are similar to those in the United States.) There is very little domestic promotion. An aggressive promotional program is planned for Hong Kong.

Investment costs for planting are very high, A\$25,000 per hectare.

Almonds

Production of almonds in Australia currently ranges from 2,500 to 3,100 metric tons. Imports of about 2,000 tons come almost entirely from the United States. Because of their dominance in trade in the world market, U.S. producers basically set the price for almonds in Australia.

Production is trending up in Australia, because of strongly increasing demand. Production is expected to reach 5,000 tons by 1999. Tree numbers are increasing each year.

Import tariffs, which are currently at 9 percent, will decline to 5 percent ad valorem by 1997.

Earlier this year, the South Australian state government provided the almond industry with a A\$1.5 million grant for the construction of a processing plant. This grant was matched by A\$1 million from the local cooperative.

(For further information on supply, distribution, and trade, contact Mark Thompson, 202-720-6877. For information on production, contact Kelly Kirby at 202-720-6791.)

Production, Supply, and Distribution of Selected Australian Horticultural Products

	Beginning Stocks	Production	Imports	TOTAL SUPPLY	Exports	Domestic Consumption 1/	Ending Stocks
Wine		KL					
1988/89	494,245	494,200	9,500	997,945	40,400	318,881	547,903
1989/90	547,903	439,275	10,100	997,278	41,700	311,011	552,359
1990/91	552,359	394,290	9,100	955,749	57,000	303,390	585,208
1991/92	585,208	452,565	8,700	1,046,473	77,579	323,532	604,014
1992/93	604,014	447,500	7,800	1,059,314	103,000	325,000	631,000
1993/94	631,000	488,000	7,000	1,126,000	136,000	325,000	665,000
Citrus							
Fresh Oranges		MT					
1988/89	0	544,000	9,000	553,000	32,000	521,000	0
1989/90	0	458,000	4,000	462,000	45,000	417,000	0
1990/91	0	485,000	4,000	489,000	71,000	418,000	0
1991/92	0	595,000	5,000	600,000	83,000	517,000	0
1992/93	0	553,000	5,000	558,000	75,000	483,000	0
Fresh Grapefruit		MT					
1988/89	0	33,000	1,000	34,000	0	34,000	0
1989/90	0	26,000	0	26,000	0	26,000	0
1990/91	0	28,000	0	28,000	0	28,000	0
1991/92	0	27,000	1,000	28,000	1,000	27,000	0
1992/93	0	31,000	1,000	32,000	1,000	31,000	0
Fresh Lemon		MT					
1988/89	0	32,000	2,000	34,000	1,000	33,000	0
1989/90	0	36,000	2,000	38,000	1,000	37,000	0
1990/91	0	35,000	1,000	36,000	2,000	34,000	0
1991/92	0	35,000	2,000	37,000	1,000	36,000	0
1992/93	0	31,000	2,000	33,000	2,000	31,000	0
Fresh Tangerines		MT					
1988/89	0	40,000	0	40,000	2,000	38,000	0
1989/90	0	43,000	0	43,000	4,000	39,000	0
1990/91	0	44,000	0	44,000	4,000	40,000	0
1991/92	0	47,000	0	47,000	7,000	40,000	0
1992/93	0	49,000	0	49,000	7,000	42,000	0
Juice, Orange		MT - 65 degree brix					
1988/89	9,822	22,705	10,993	43,520	1,596	30,200	11,724
1989/90	11,724	20,012	5,532	37,268	1,636	27,845	7,787
1990/91	7,787	21,468	14,284	43,539	988	27,669	14,882
1991/92	14,882	25,033	7,098	47,013	978	34,658	11,377
1992/93	11,376	23,724	11,724	46,824	977	34,195	11,652
Fresh Deciduous Fruit							
Fresh Apples		MT					
1988/89	0	350,000	5	350,005	20,236	329,769	0
1989/90	0	330,000	0	330,000	26,621	303,379	0
1990/91	0	289,000	0	289,000	25,814	263,186	0
1991/92	0	324,000	0	324,000	35,742	288,258	0
1992/93	0	340,000	0	340,000	33,500	306,500	0
1993/94	0	321,000	0	321,000	33,000	288,000	0

Beginning Production		Imports	TOTAL	Exports	Domestic	Ending	
Stocks			SUPPLY	Consumption 1/	1/	Stocks	
Fresh Apricots		MT					
1988/89	0	29,500	207	29,707	282	29,425	0
1989/90	0	31,000	143	31,143	207	30,936	0
1990/91	0	33,130	542	33,672	238	33,434	0
1991/92	0	34,000	721	34,721	224	34,497	0
1992/93	0	33,400	750	34,150	240	33,910	0
Fresh Peaches & Nectarines		MT					
1988/89	0	75,000	1,525	76,525	764	75,761	0
1989/90	0	63,370	2,051	65,421	522	64,899	0
1990/91	0	68,033	2,238	70,271	600	69,671	0
1991/92	0	72,000	2,384	74,384	620	73,764	0
1992/93	0	74,000	2,400	76,400	620	75,780	0
Fresh Pears		MT					
1988/89	0	147,000	60	147,060	21,118	125,942	0
1989/90	0	171,000	87	171,087	33,322	137,765	0
1990/91	0	160,000	151	160,151	26,260	133,891	0
1991/92	0	187,000	0	187,000	38,701	148,299	0
1992/93	0	171,000	0	171,000	32,000	139,000	0
1993/94	0	176,000	0	176,000	38,000	138,000	0
Canned Deciduous Fruit							
Canned Mixtures		MT					
1988/89	8,402	22,000	0	30,402	12,092	9,000	9,310
1989/90	9,310	24,100	0	33,410	21,141	10,500	1,769
1990/91	1,769	30,400	0	32,169	21,035	10,900	234
1991/92	234	33,000	0	33,234	22,014	10,800	420
1992/93	420	31,000	0	31,420	20,000	10,800	620
Canned Peaches		MT					
1988/89	4,933	24,500	2,583	32,016	12,803	13,000	6,213
1989/90	533	36,000	4,075	40,608	15,116	16,000	9,492
1990/91	9,492	30,000	3,583	43,075	19,770	18,900	4,405
1991/92	4,405	32,000	2,545	38,950	13,619	18,900	6,431
1992/93	6,431	35,000	2,400	43,831	17,000	18,900	7,931
Canned Pears		MT					
1988/89	10,050	39,000	447	49,497	22,345	15,000	12,152
1989/90	18,450	37,000	813	56,263	32,817	6,500	16,946
1990/91	16,946	42,000	580	59,526	41,466	6,000	12,060
1991/92	12,060	55,000	858	67,918	41,709	5,600	20,609
1992/93	20,609	45,000	500	66,109	41,000	6,000	19,109
Dried fruit							
Sultanas (Raisins)		MT					
1988/89	6,600	60,012	5,055	71,667	42,256	24,878	4,533
1989/90	4,533	59,154	4,416	68,103	42,256	24,643	1,204
1990/91	1,204	85,478	8,620	95,302	49,151	31,484	14,667
1991/92	14,667	96,743	6,064	117,474	46,574	32,000	38,900
1992/93	38,900	42,634	4,500	86,034	48,500	31,000	6,534

Notes - quantities in units shown.

1/ Total consumption includes fresh and processing uses.

Wine production figures for 1992/93 and 1993/94 are based on wine grape production estimates. Total supply and total utilization figures may not add due to rounding.

Beginning and ending stock figures do not apply to fresh fruit commodities.

Figures are official USDA estimates, and may differ from those in article.

Sources: ABARE, ABS, office of Agricultural Counselor, and other government and industry sources.

Concentrated Apple Juice Outlook for Selected Countries

In 1993/94, concentrated apple juice (CAJ) will be in abundant supply, with production in selected countries of 527,014 tons (metric), putting downward pressure on prices. Though production is down slightly from last year's record levels, there will still be a surplus of raw material for CAJ production from crushing of record crops in the United States and Argentina, in addition to stock carryover from the record European (EU) crop of 2 years ago. The outlook is for continued large supplies of CAJ because of increasing world apple production. The most promising new markets for CAJ trade are in the Pacific Rim and Latin America because of rising incomes. The United States is a net importer of CAJ. Most U.S. exports of CAJ go to Japan and Canada.

Global Apple Production

Currently there is an abundant world supply of apples on the market, with 1993/94 production for selected major counties forecast at about 30 million tons, slightly below the record set last year. The United States and South America had record apple crops, and EU production is forecast at continued high levels. Fresh apples from the Southern Hemisphere are arriving in world markets, and the forecast is for another excellent harvest, particularly in Argentina. Because of the increasing world supply of apples and stable demand for fresh fruit, processing is necessary to utilize the large crop of fresh apples.

Concentrated Apple Juice (CAJ)

On average, an estimated 20 percent of world production of apples is processed during the crop year, primarily into juice. This season there will be plenty of raw material for CAJ production, resulting in large supplies being added to existing stocks, pressuring lower prices. The proportion of an apple crop that is juiced varies in each country according to crop size and quality, demand from the fresh sector, and industrial capacity. In general, apples not suitable for the fresh market go into processing, although in many instances, apples are grown specifically for processing. The availability and price of imported CAJ also determine the processing rate. In the United States, apple juice accounts for about

one-half of all processed apple products; other products are canned sauce, canned slices, dried apples, frozen slices, and vinegar.

Each variety of apple produces a juice with distinct characteristics such as body, color, sweetness, and fragrance. In Washington State, most apple juice is processed from Red Delicious and Golden Delicious varieties. Elsewhere in the United States a wider mix of varieties is used for processing juice.

Before 1940, apple juices were largely used as ingredients in soft drinks. In recent years, CAJ has become an important international commodity, with large quantities produced by the United States, Germany, Argentina, and Chile. In the United States, apple juice ranks second only to orange juice in per capita consumption. A large proportion of juice produced in the United States is single-strength, not concentrated.

Apple juice is concentrated in order to reduce the volume and weight. This reduction lowers costs of packaging, storage, and transportation. Processing of apples into concentrate permits continuous utilization of fresh and cold storage apples. Evaporation is used to remove water from apple juice.

The first step in processing apples into concentrate is to crush the apples received at a plant. Then, the apple mash is placed in

centrifuges to separate the juice from the solid components, followed by heated evaporation of water from the juice. The level of pressure and temperature applied to the product in evaporation units determine the concentration of juice produced, or Brix level. The Brix/acid ratio, or sugar/acid ratio, is the ratio of soluble sugar solids to the total acid content, or simply the quality that gives juice its sweetness and acidity sensation. Finally, the juice goes through prefilters and a membrane system to produce a clear product. After processing, the CAJ is pumped into tanks, then packed in 55 gallon drums for shipment.

CAJ Producers

The United States, Germany, Argentina, Italy, and Chile account for over one-half of global production. Not surprisingly, these countries are major apple producers, with large supplies of fresh apples for crushing. Worldwide, CAJ supplies are high and prices are depressed because of large EU apple crops the last 2 years and record apple production in the United States and Argentina in 1993/94.

Northern Hemisphere CAJ Producers

During 1993/94, the **United States** is estimated to have the second largest apple crop after 1987; thus, there should be a plentiful supply of apples available for crushing, with CAJ production forecasted at 150,000 tons, a slight decrease from last year. On a regional basis, holdings of apples in the Northeast decreased 30 percent as of March 1, 1994, down to 5.7 million bushels from 8.2 million bushels last year as the result of a dry, hot summer which produced small apples, while in the West, apples in cold storage are up to 51.4 million bushels from 45.4 million bushels last year, a 13 percent increase. Washington State is the leading CAJ producer, processing about 50 percent of the nation's apples that go into juice.

European Union apple juice producers will face a year as difficult as last year because of slow global demand and low prices. The major producers are Germany, Italy, and France. Production of CAJ is forecast down in all countries, except Germany, reflecting the fall in world prices and the slight reduction in the supply of apples during 1993/94. These

countries also import CAJ from East European countries and re-process it for domestic consumption and export. **Germany**, the largest producer of CAJ in the EU, and second in the world, will produce about 95,000 tons of apple juice, a 3 percent increase from last year because processors have large stocks of apples. Additionally, imports of CAJ by Germany are up resulting in re-processing of more CAJ.

Italian production of CAJ is down 26 percent as the result of high stock levels, limited export opportunities, and low domestic demand. In 1993/94, **French** production of CAJ is forecast to decline 36 percent to 14,000 tons because of a reduced crop of cider apples. **Austrian** production of CAJ is forecast to fall slightly in 1993/94 to 17,000 tons, with about 110,000 tons of domestic apples processed and 40,000 tons of imported apples processed.

The scene in Eastern Europe is also marked by reduced apple production. In **Hungary**, apple juice production continues to fall, forecast at 24,000 tons in 1993/94, because of declines in apple production and increases in fruit processor bankruptcy. In Hungary's Szabolcs-Szatmar-Bereg area, where about half of commercial orchards are located, 4 processors closed in 1993. It is not known how many processors remain in Hungary. There is virtually no new investment in Hungarian orchards at this time; as a result, a large percentage of apple orchards are over 25 years old. **Poland**, a major supplier of CAJ to Germany, has also had difficulties in the processing sector as subsidies have been abolished on fuel and other production inputs. Estimates of CAJ production in 1991 were 69,000 tons, of which 57,000 tons was exported. Imports of all fruit juice in 1991 were 11,600 tons, with most of it being CAJ.

Mexico's CAJ production in 1993/94 is forecast at 18,200 tons, a 17 percent decline from last year. The decreasing trend is the result of low international prices which have dampened trade. As a result, Mexican apple producers are selling to the fresh fruit market before selling to processors. Under NAFTA, Mexico's tariff of 20 percent on imported CAJ from the United States will be phased out over 10 years. The U.S. tariff on CAJ already stands at zero for all MFN (Most Favored Nation) origins.

Southern Hemisphere CAJ Producers

Argentina apple production in 1993/94 is forecast to reach 1.0 million tons, 25 percent above the frost-reduced crop of 1992/93, making Argentina the largest apple-producing country in the Southern Hemisphere. Projected CAJ production in 1993/94 is 54,000 tons, up 23 percent from last year. Only 4 percent of this year's CAJ will be consumed locally while the balance is exported.

Australia's 1993/94 apple crop is forecast to decline 6 percent from last year due to flooding, hail, and high winds in Victoria's Goulburn Valley. As a result, in 1994, apple juice production is forecast at 11,800 tons, a 9 percent fall from 1993.

Chile's excellent weather during the 1993 winter should yield an excellent-quality crop in 1993/94. However, total production is estimated to decrease 5 percent based on recent reports that yields of red-variety apples, the major variety, are down from last year. Because of the large world supply of apple juice, Chile's CAJ industry reduced its output in 1993, despite an ample supply of rejected apples from the fresh apple export industry. For the first time since the industry began operating in Chile, there will be significant stocks at the wholesale level. Producers were seriously affected by the world price drop--free on board (FOB) prices fell from \$1,746 per tons in 1992 to \$1,010 per tons in 1993. Production in 1994 is forecast to fall even further based on continued oversupply in world markets. Production is geared to export markets because domestic consumption is only 1 - 2 percent of total CAJ production.

The **New Zealand** apple crop for 1994 was battered by a recent hail storm in the major producing region of Hawkes Bay, where about 50 percent of the total crop is normally produced. New Zealand is a major apple producer and exporter and this year's Southern Hemisphere crop is just now arriving on international markets. Preliminary estimates indicate that the hail damage may have destroyed up to half the Bay's export apple crop, and, as a result, New Zealand's total exports for 1994 are forecast to drop from 240,000 tons to 200,000 tons. With all the damaged fruit, one would expect that more apples are available for crushing, assuming

the apples are not severely damaged. However, given the costs of processing and low world prices, it is uncertain whether more juice will be produced from these damaged apples. Prior to the storm, CAJ production in 1994 was forecast at 19,750 tons, about the same as the previous year. The 1993 level was a 9 percent increase from the previous year, reflecting a continuation of higher reject rates due to tighter grade standards, a poor crop with lower fruit size, and increased hail-damaged fruit. About 85 percent of total processed apples are crushed for juice, with the remainder used for canning and an increasing amount for drying. New drying facilities have been commissioned in Hawkes Bay and Gisborne which will take an increasing volume of fruit over the next few years.

South Africa's 1993 apple crop did not reach the expected record of over 602,000 tons, and was marginally less than the 1992 crop at 597,378 tons. However, production in 1994 is forecast to reach a record 630,000 tons with the help of newly maturing trees. In spite of increased fresh apple production, CAJ production is forecast to be stagnant in 1994 at 20,320 tons because of depressed world prices and poor domestic economy.

Current Trends in CAJ Trade

Overview

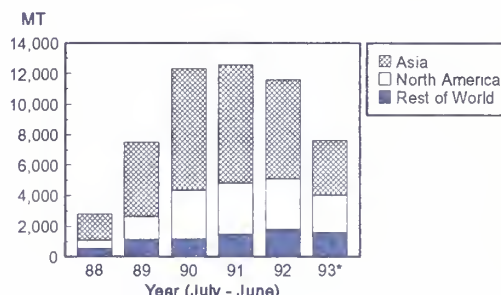
In 1993/94, world suppliers of CAJ are forecast to export large tonnages at the rate of last year, but total revenues will be lower because of a likely steep fall in world prices. Only countries that increase exports of CAJ, such as Germany, will earn more. This trend of low prices and high trade levels is a continuation of last year. The largest CAJ importer in the world is the United States, which purchases, on average, 30 percent of the world's CAJ exports. During 1993/94, imports by the United States are forecast to be at the highest level since 1990/91 because of low-priced, plentiful product from the EU and South America. Germany is the world's next largest importer, and is also the largest exporter, including EU intra-trade.

Northern Hemisphere

During the period July 1993 to January 1994, imports of CAJ by the **United States** are up 32 percent compared with the same period last year. Based on this trend and historical import data, total U.S. imports in 1993/94 are projected to be 200,000 tons, the highest level since 1990/91. Though U.S. CAJ supplies are forecast to be plentiful, low world prices may be tempting U.S. importers to further increase CAJ stocks. During 1993/94 imports of CAJ from South America, which are up 77 percent from 1992/93, are forecast to account for 54 percent of total U.S. imports. Imports from Europe, which are down 9 percent from 1992/93, are forecast to account for 19 percent of total U.S. imports. Overall, industry sources expect high U.S. stocks of CAJ because of high U.S. production levels, cheaply available imported juice, and stable domestic demand.

During 1993/94, the United States is projected to export only 8,000 tons of CAJ, a 34 percent drop from last year. The United States is not a major exporter of CAJ because of ready availability and lower price of CAJ from Eastern Europe and South America. However, since the 1980's, exports of CAJ increased steadily until 1992/93 when there were large supplies of CAJ from the massive EU apple crop. Since 1988, the ratio of CAJ exports to imports has averaged 5 percent, and in 1993/94 it is forecast to be down to 4 percent. Japan and Canada, the major CAJ export markets for the United States,

U.S. Exports of Concentrated Apple Juice to Regions of World



* Forecast based on current and historical export share July - January
Source: U.S. Department of Commerce

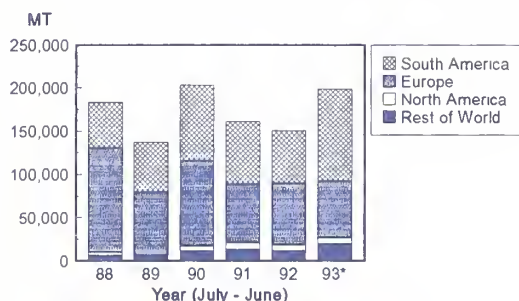
have imported about 55 percent of total U.S. CAJ during the period July to December, 1993. Exports to Canada have been climbing the last five years, but the highest growth rate in CAJ exports was to the Pacific Rim, specifically Japan and Korea.

Germany, the leading CAJ exporter in the world, depends heavily on imports of CAJ for further processing, and the price of apples in Germany depends heavily on the price of imported CAJ. Imports of CAJ are forecast up slightly this year to 130,000 tons, second in the world only to the United States. Poland and Italy alone provided about 50 percent of Germany's CAJ imports in 1992.

CAJ trade for other EU countries is down, despite low CAJ world prices, because of stagnant domestic consumption resulting from Europe's recession. Domestic supplies are sufficient to meet demand. **Italy's** exports are down slightly because of the 26 percent reduction in production. Almost all Italian CAJ is exported, primarily to Germany, where, in some cases, it is re-exported to the United States after blending with juice from other sources. **France's** trade in CAJ is relatively unchanged this year, despite a 37 percent decline in production of CAJ since last year. Germany is France's leading supplier of CAJ, followed by the Netherlands. The United Kingdom absorbs more than half of French CAJ exports.

Austria imports most of its apples for processing

U.S. Imports of Concentrated Apple Juice from Regions of World



* Forecast based on current and historical exports share July - January
Source: U.S. Department of Commerce

and CAJ from Poland and Hungary, and there was a 41 percent increase in imports in 1992/93. Austrian CAJ exports are forecast to be up 33 percent in 1993/94, attributed to the CAJ imports in 1992/93. Because of EU duty-free imports of apple juice concentrate from Austria, the increased supply of Austrian CAJ caused great concern last fall from other EU apple juice producers. Action was taken by French producers to restrict Austrian duty-free CAJ exports to only Austrian-origin raw product. The outcome of the French request is unknown at this time.

Eastern European producers historically provide large volumes of fresh apples and CAJ to major European producers such as the Netherlands, Austria and Germany. However, production has been hampered by the monumental economic adjustment now occurring throughout the former Eastern Bloc. In October 1993, **Hungarian** officials announced an increase in export subsidies to assist exports of apples and CAJ, including an increase in the existing 25 percent export subsidy on CAJ. However, at current world market prices, such export subsidies are of little help--exports are forecast at 17,000 tons, a fall of 15 percent from the previous year. **Poland**, which normally produces about 1.3 million tons of apples per year, is forecast to experience declines in fresh apple and CAJ production as the result of economic difficulties.

Southern Hemisphere

South American CAJ producers export the bulk of their CAJ production to the United States, Japan, and Europe. In 1994, no imports of CAJ are forecast, while exports are forecast at 80,500 tons, a slight increase from 1993. **Argentina**, the largest CAJ trader in South America, is expected to export 95 percent of its traded CAJ to the United States, followed by 3 percent of exports to Japan.

New Zealand's CAJ exports during 1993/94 are forecast at 15,000 tons, a 14 percent increase from 1992/93. At this time it is not certain how a recent hail storm will affect the rate of apple

processing. The projected export increase is attributable to New Zealand's proximity to the growing markets of South East Asia. About 80 percent of New Zealand's CAJ supply is exported, with about 90 percent destined for Australia, Japan, and the United States. Exports to the United States have fallen 59 percent the last 2 years, indicative of the global CAJ surpluses. Domestic consumption has increased from 5.3 liters to 8.4 liters per capita the last 5 years, another reason for the CAJ production increases. New Zealand's imports of CAJ are minimal.

Australian juice exports in 1994 are forecast at 3,500 tons, about the same as in 1993. Australia exports most of its CAJ to Japan and Singapore, and imports CAJ from New Zealand. Little if any trade was done with the United States or the EU, presumably because of high transportation costs.

Prospects for the CAJ Industry

The growth markets for CAJ will be in countries where incomes are rising such as in Latin America and the Pacific Rim. A significant demand could be created in these countries if there was growth of per capita consumption of juice to 10 liters per capita. By comparison, Germany's per capita consumption of juice is about 40 liters per year, the highest rate in the world. Some industry sources expect Chinese demand will be higher than Japan and Canada combined. However, trade barriers exist such as high tariffs which will continue to limit export growth potential.

For the United States, the best opportunities will be those countries where we enjoy geographic proximity and lower transportation costs compared with Eastern European or Mediterranean juice producers, such as Canada, Mexico, and the Caribbean.

(For further information on supply, distribution, and trade, contact Casey Bean at 202-720-4620.)

TABLE 1
CONCENTRATED APPLE JUICE: PRODUCTION AND UTILIZATION
IN SELECTED COUNTRIES
(METRIC TONS AT 70/71 DEGREES BRIX)

Country/ Mkting Year 1/	Beginning Stocks	Production	Imports	TOTAL SUPPLY	Exports	Domestic Consumption	Ending Stocks
NORTHERN HEMISPHERE COUNTRIES							
Austria							
1991/92	6,000	17,900	20,700	44,600	31,000	8,750	4,850
1992/93	4,850	23,000	29,300	57,150	22,600	8,800	25,750
1993/94	25,750	17,000	16,050	58,800	30,000	8,800	20,000
France							
1991/92	0	8,900	3,800	12,700	5,200	7,500	0
1992/93	0	22,300	4,600	26,900	4,900	22,000	0
1993/94	0	14,000	4,000	18,000	5,000	13,000	0
Germany							
1991/92	6,355	90,315	151,177	247,847	69,227	141,390	37,230
1992/93	37,230	92,121	120,000	249,351	75,000	150,000	24,351
1993/94	24,351	95,000	130,000	249,351	75,000	150,000	24,351
Hungary							
1991/92	0	32,000	0	32,000	25,000	7,000	0
1992/93	0	27,000	0	27,000	20,000	7,000	0
1993/94	0	24,000	0	24,000	17,000	7,000	0
Italy							
1991/92	10,500	43,000	5,000	58,500	39,000	7,780	11,720
1992/93	11,720	54,600	7,912	74,232	54,217	6,000	14,015
1993/94	14,015	40,000	7,000	61,015	50,000	6,000	5,015
Mexico							
1991/92	0	23,400	0	23,400	21,600	1,800	0
1992/93	0	21,800	0	21,800	19,500	2,300	0
1993/94	500	18,200	500	19,200	16,700	2,500	0
Netherlands							
1991/92	0	11,912	66,000	77,912	23,253	54,659	0
1992/93	0	10,960	73,000	83,960	26,905	57,055	0
1993/94	0	10,944	73,000	83,944	26,905	57,039	0
Spain							
1991/92	900	8,000	7,100	16,000	5,400	10,600	0
1992/93	0	22,500	6,600	29,100	18,700	10,400	0
1993/94	0	20,000	7,000	27,000	17,000	10,000	0
United States 2/							
1991/92	0	134,999	161,127	296,126	12,555	283,571	0
1992/93	0	152,040	150,295	302,335	11,578	290,757	0
1993/94	0	150,000	200,000	350,000	8,000	342,000	0
Former Yugoslavia (Serbia and Montenegro)							
1991/92	250	3,000	0	3,250	1,700	1,400	150
1992/93	150	1,300	0	1,450	0	1,250	200
1993/94	200	1,000	0	1,200	0	950	250
Subtotal							
1991/92	24,005	373,426	414,904	812,335	233,935	524,450	53,950
1992/93	53,950	427,621	391,707	873,278	253,400	555,562	64,316
1993/94	64,816	390,144	437,550	892,510	245,605	597,289	49,616
SOUTHERN HEMISPHERE COUNTRIES							
Argentina							
1991/92	1,500	65,000	0	66,500	63,969	2,000	531
1992/93	531	44,000	0	44,531	42,031	2,000	500
1993/94	500	54,000	0	54,500	52,000	2,000	500

TABLE 1 (CONT'D)
CONCENTRATED APPLE JUICE: PRODUCTION AND UTILIZATION
IN SELECTED COUNTRIES
(METRIC TONS AT 70/71 DEGREES BRIX)

Country/ Mkting Year 1/	Beginning Stocks	Production	Imports	TOTAL SUPPLY	Exports	Domestic Consumption	Ending Stocks
Australia							
1991/92	0	10,607	1,542	12,149	4,586	7,563	0
1992/93	0	12,936	1,688	14,624	3,432	11,192	0
1993/94	0	11,800	1,600	13,400	3,500	9,900	0
Chile							
1991/92	0	34,000	0	34,000	33,500	500	0
1992/93	0	34,000	0	34,000	33,600	400	0
1993/94	0	31,000	0	31,000	28,500	500	2,000
New Zealand							
1991/92	164	18,445	243	18,852	14,595	3,957	300
1992/93	300	19,837	178	20,315	13,129	4,486	2,700
1993/94	2,700	19,750	200	22,650	15,000	4,650	3,000
South Africa, Republic of							
1991/92	0	19,835	0	19,835	13,385	6,450	0
1992/93	0	20,310	0	20,310	14,075	6,235	0
1993/94	0	20,320	0	20,320	14,020	6,300	0
Subtotal							
1991/92	1,664	147,887	1,785	151,336	130,035	20,470	831
1992/93	831	131,083	1,866	133,780	106,267	24,313	3,200
1993/94	3,200	136,870	1,800	141,870	113,020	23,350	5,500
WORLD							
1991/92	25,669	521,313	416,689	963,671	363,970	544,920	54,781
1992/93	54,781	558,704	393,573	1,007,058	359,667	579,875	67,516
1993/94	68,016	527,014	439,350	1,034,380	358,625	620,639	55,116

1/ Northern Hemisphere marketing years are July - June for all countries except Italy where the marketing year is January - December. Southern Hemisphere marketing year is January - December except New Zealand where marketing year is October-September. The year 1993/94 is a forecast.

2/ U.S. stock figures not available. CAJ production calculated by multiplying apple production data and percent juiced (1993/94 estimated by average juice share 1991/92-1992/93). Exports and imports based on U.S. Department of Commerce data, with 1993/94 projected by using current and historical trade numbers (last 3 years) during July - January period. At time of printing, January 1994 was most current U.S. trade data available.

Sources: U.S. Department of Commerce, Bureau of Census. Reports from U.S. Agricultural Attaches and USDA/FAS estimates. Trade and industry sources. Non-Citrus Fruits and Nuts, 1993 Preliminary (USDA/NASS)

TABLE 2
U.S. TRADE OF CONCENTRATED APPLE JUICE BY REGION
1988/89-1993/94 1/
(METRIC TONS AT 70/71 BRIX)

IMPORTS

<u>Source</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>	<u>1991</u>	<u>1992</u>	<u>1993 2/</u>
South America	52,653	57,862	87,689	72,748	60,348	106,605
Europe	121,419	73,682	98,520	67,831	71,696	65,407
South Africa	154	66	0	549	3,647	7,302
Middle East	3,343	1,115	6,912	8,280	5,531	8,300
North America	3,807	2,437	5,534	8,341	7,138	7,794
Other Countries	<u>2,060</u>	<u>2,170</u>	<u>4,425</u>	<u>3,378</u>	<u>1,935</u>	<u>3,309</u>
Grand Total	183,435	137,331	203,079	161,127	150,295	198,716

EXPORTS

<u>Source</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>	<u>1991</u>	<u>1992</u>	<u>1993 2/</u>
Asia	1,712	4,868	7,934	7,762	6,492	3,593
North America	546	1,520	3,196	3,370	3,328	2,443
Central America	99	359	281	447	753	359
South America	4	1	21	120	251	311
Europe	19	52	69	35	112	301
Middle East	84	56	84	116	130	90
Other Countries	<u>323</u>	<u>644</u>	<u>712</u>	<u>706</u>	<u>512</u>	<u>498</u>
Grand Total	2,786	7,500	12,297	12,555	11,578	7,594

1/ Marketing year begins in July of year indicated.

2/ Forecast based on current and historical (last 3 years) share of total imports occurring during period July to January. At time of printing, January 1994 was the most recent trade data available.

Source: Department of the Census, USDOC

AVOCADO SITUATION IN SELECTED COUNTRIES

Over the next few years, the United States will see increased production of avocados from existing acreage, while other major producing countries (Mexico, Chile, and Israel) will see increased production from newly planted acreage coming into bearing. The United States is coming off a banner year both in fruit volume and quality of the crop. In 1992/93, U.S. exports reached \$14.5 million, up 58 percent from 1991/92. Given the increasingly competitive marketplace, continued expansion of promotional campaigns into new Japanese cities, outside of Tokyo, and other promising markets worldwide will be necessary for the United States to increase its exports.

Israel

In Israel, avocados were planted as an export crop and developed rapidly throughout the 1960's and 1970's. By 1983 planted area had reached 11,300 hectares, of which 4,200 hectares were not yet of bearing age. The highest level of production, 127,000 tons, was attained in 1986 when almost 100,000 tons were exported. However, this successful period of avocado production and trade in Israel began to decline in the latter half of the 1980's due to a series of financial and natural disasters which hit Israel's agriculture. Beginning with the New Economic Policy of 1985, which triggered an economic crisis throughout most of Israel's agriculture and followed by two or three years of consecutive natural disasters and a severe reduction in irrigation quotas at the end of the 1980's, several hundred hectares of bearing avocado plantations were uprooted.

In marketing year 1993/94 (October-September), Israel's avocado production is forecast at 75,000 tons, up 97 percent from the previous season. Favorable weather during the production season was the primary factor for this increase. In 1992/93, low production and export levels were recorded mainly due to longer term effects of adverse weather conditions, i.e., freezing, hail and snow, etc. occurring during the winter of 1991/92 which caused some tree damage.

Throughout the development of the avocado industry in Israel the three mainstay varieties have been Ettinger, the earliest ripening variety, Fuerte and Hass. Other varieties tested and planted include Nabal, Reid, Bennik, Pinkerton,

Horshim (a locally developed variety) and others. Small quantities of organically grown fruit have also been produced and sold abroad.

Ettinger is the variety preferred by the individual grower because of its relatively high yields and early ripening qualities. Ettinger is harvested before the beginning of December which escapes any frost that may hit the avocado growing regions. Hass, Fuerte and Nabal are higher yielding but are harvested later and are more susceptible to frost than Ettinger.

In marketing year 1993/94, Israeli avocado exports are forecast at 60,000 tons, up 122 percent from the previous season. This increase has been triggered primarily as a result of increased production. The main thrust of Israel's avocado export efforts has been consistently directed towards the French market, Europe's chief consumer of avocados. Spain is becoming Israel's chief competitor in the European market, especially in France. Other European customers importing Israeli avocados include the United Kingdom, Germany, the Netherlands, Denmark, and Switzerland.

Israel's avocado exports are characterized by large fluctuations, mostly caused by adverse weather conditions which hit in various years. The largest quantity, 98,000 tons, exported in marketing year 1986/87, came at the height of plantation development. At that time Israel was almost alone in supplying fruit to the European winter market, and its exporters were planning on annual sales of 100,000 tons or more before the industry declined.

AGREXCO, Israel's principal avocado exporter, estimates that Spain's avocado production in 1992/93 totaled 40,000 tons, of which 28,000 tons were exported. The European Union (EU) is also a primary market for Spain's avocados. Mexico is another important supplier of avocados

to the European market. In marketing year 1992/93, Mexico shipped 7,500 tons of fruit to Europe. South Africa is a major supplier of avocados to the EU in the summer.

Israel: Avocado Production, Area and Exports, Marketing Year 1970-1992

<u>Year</u>	<u>Planted Area</u>		<u>Production</u>	<u>Total Sales</u>	
	<u>Total</u>	<u>Bearing</u>		<u>Exports</u>	<u>Domestic</u>
	-----Hectares-----		-----	-----Metric tons-----	
1970/71	2,270	1,100	7,600	4,400	3,200
1975/76	4,380	2,190	18,500	15,000	3,500
1980/81	9,800	4,540	8,000	6,300	1,700
1983/84	11,300	8,190	52,500	42,600	9,900
1986/87	11,000	9,500	127,000	98,000	29,000
1987/88	10,230	9,730	33,300	26,000	6,700
1988/89	9,300	9,000	17,900	13,000	4,900
1989/90	8,800	8,500	45,700	35,700	10,000
1990/91	9,100	8,500	52,700	38,600	14,100
1991/92	8,700	8,100	74,400	50,300	24,100
1992/93	8,700	8,100	38,000	27,100	10,900

Source: Economics Department, Israel Farmers' Union.

Chile

Avocado production in Chile in 1993 is estimated at 45,000 tons, unchanged from 1992. A larger crop had been forecast in early 1993, but frost during August 1993 adversely affected the volume and quality of the crop. Output in 1994 also is expected to be below potential as a result of frost damage during the blossoming period. Production, which has been expanding rapidly during recent years, is expected to continue to grow in the near future, based on a large percentage of total planted area that has yet to reach bearing age. Total planted area has expanded from 4,000 hectares in 1973 to over 9,000 hectares in 1993.

In Chile, avocados are grown by approximately 2,650 producers which are located in the central part of the country, from Region IV (La Serena) through Region VI (Rancagua). The most important planted areas are in the Quillota area (Region V), where over 60 percent of the trees are located. As a result of the numerous planted varieties, avocados are harvested year-round in Chile. The two major varieties are Hass and Fuerte, which account for 56 percent and 14 percent of total trees, respectively. Other planted varieties include the Bacon, Edrancol, Negra de la Cruz, and others. Most of the recent plantings have been the Hass variety, which is favored for exports. In 1993, Hass production accounted for 63 percent of the total avocado crop. Hass production is projected to reach 51,000 tons by 1997.

Chile: Avocado Planted Area, Production and Exports, Calendar Year

<u>Year</u>	<u>Planted Area</u> (Hectares)	<u>Production</u> -----Metric tons-----	<u>Exports</u>
1980	6,180	25,000	12
1985	7,605	28,900	1,200
1989	8,195	37,000	3,592
1990	8,315	38,800	11,557
1991	8,450	39,000	13,956
1992	9,144	45,000	16,654
1993	9,376	45,000	5,000

Source: U.S. Agricultural Attache

The introduction of new varieties (particularly Hass) in recent years, combined with excellent international prices, opened up many new opportunities in the export market.

As a result of a dramatic fall in Chilean avocado exports in 1993, large amounts of domestic fruit have remained on the local market. Foreseeing this large increase in domestic supply, avocado producers and traders initiated a promotional campaign early in the season designed to spur increased consumption. The campaign, which represents the first-ever such program in Chile's domestic fruit sector, has achieved solid success in generating increased demand. Evidence of this success is that prices have fallen but not collapsed in the domestic market.

Domestic avocado consumption in Chile is considered to be low for a producing country - around 2.3 kilograms per person in 1992, compared to 8 kilograms per person in Mexico. The Chilean avocado producers association estimates that domestic consumption will increase to around 40 percent of total production in 1993 as a result of the ongoing promotional campaign and the fall in average domestic prices. The average retail price for avocados in Chile in January 1993 was US\$1.60 per kilogram, compared to US\$1.30 per kilogram in October 1993.

The United States continues to be Chile's primary export market for avocados, accounting for 97 percent of the total export volume in 1992. Due to competition from a large California avocado crop, Chile's avocado exports fell significantly to around 5,000 tons in 1993 compared to 16,000 tons in 1992. Chilean exporters had hoped to capitalize on decreased output of alternative

suppliers by boosting their market share in Europe, but export sales were lower than anticipated because of the low average quality of the 1993 crop. Nonetheless, the volume exported to the EU was greater than in previous seasons. Producers are also expanding the market in Argentina through promotional campaigns. Chile's longer term projection is to export over 33,000 tons of avocados annually.

Chile's avocado producers and exporters have agreed to contribute US\$0.10 per box of fruit exported toward foreign market campaigns, principally in the European market. During the 1992/93 marketing year (September 1 to August 31), contributions by 99 percent of Chilean producers and exporters of US\$0.11 per box exported were used to finance a promotional campaign in the United States. Chile's avocado producers have indicated that their current break-even export price is around US\$15.00-17.00 per 11.2 kilogram box.

Avocado producers have requested that the Chilean Government initiate negotiations with the United States to include avocados in the Generalized System of Preferences (GSP). Presently Chilean avocados pay a duty of 13.2 cents per kilogram or the equivalent of \$1.50 per box of 11.2 kilograms (a duty of about 10 percent). The Chilean Government provides no subsidies or special tax incentives to avocado production.

Japan

Japan is not a commercial producer of avocados, but is considered by major world producers to be

a premium market both for quality and prices paid for avocados. Avocados have become a permanent feature of the produce market in Japan, but cannot be said to have become a mainstream item, and are in many ways still a very new produce.

Japan is the largest offshore market for U.S. avocados. Avocados from the United States were first commercially introduced in Japan in 1970. Growth in avocado sales and consumer acceptance and familiarity has grown steadily since 1970, and have been greatly boosted by the USDA/Cooperator program, and the subsequent advent of the TEA and MPP programs. U.S. export growth to Japan was set back considerably by domestic supply problems in the late 1980's and early 1990's.

The Japanese trade prefers large size avocados, 24 or fewer per tray, perceiving smaller size fruit to be of lower quality. This has caused some difficulties in the past with the trade being reluctant to carry the size 30's that California packers would sometimes like to deliver. A near-term goal of the California industry is to convince

Japanese traders that smaller fruit with a lower price can be equal in quality to higher priced fruit that is larger.

Only the Hass variety of avocado is marketed in Japan, and most of these are sold at the retail level for consumption in the home, usually consumed plain or with soy sauce. Avocados are often used in somewhat non-traditional ways in Japan, such as in ice cream, milk shakes, soup, etc. The apparently high degree of acceptance of these imaginative products suggests potential growth in areas of food and beverage industry.

As with most fresh produce, avocados are distributed in Japan through a multi-tiered system. A few large importers bring in the bulk of avocados from the United States and Mexico, and in turn sell their produce to one of the several key wholesalers in the major wholesale markets throughout Japan. These wholesalers in turn arrange sales through a large number of independent "jobbers" who break up large lots of product into smaller parcels for sales and delivery to individual retailers and food service operations. In general, most of the price risk is borne by the importers.

Japan: Imports of Fresh Avocados, Calendar Years (Metric tons)

<u>Year</u>	<u>United States</u>	<u>Mexico</u>	<u>Total</u>
1989	1,684	1,009	2,693
1990	991	1,252	2,163
1991	1,010	1,645	2,664
1992	2,160	1,398	3,558
1993	3,163	309	3,472

Source: Japan's Customs Bureau, Ministry of Finance.

Mexico provides the only real competition for U.S. avocados in the Japanese market, although Mexico's market share can change dramatically from year to year. The main edge Mexican avocados have over U.S. avocados is significantly lower prices, which are further enhanced by a lower import duty, due to Mexico's status under the Generalized System of Preferences. Arising from the price gap comes another advantage, which is that Mexican product can be sold on a consignment basis, greatly increasing flexibility of local players to

change their pricing strategy while minimizing import risk. U.S. shippers faced with much higher cost structure are usually unable to tolerate the uncertainty of consignment, and so demand a firm price in advance. Finally, Mexican shippers have been well-placed to exploit market opportunities created by U.S. supply problems in recent years, and have been able to, at least temporarily, expand their marketing season at the expense of the United States.

However, Mexican avocados entering the

Japanese market have frequent quality problems, and lack support from their producers, compared to the strong marketing efforts by the California industry. Given the crucial importance of near-perfect quality and strong after-service in the Japanese produce market, these shortcomings greatly undercut the level of support and loyalty of local players. In contrast, the local trade seems to have a high degree of loyalty to California avocados, as evidenced by its continued support of the product despite recent U.S. crop shortages. This loyalty presumably is due to the higher quality of California avocados and by California's strong promotional and technical support in the Japanese market.

California avocados are available in the Japanese market from January to September, while Mexican avocados were available from August through March.

Retail prices for U.S. avocados floats between 100 and 150 yen per piece, while wholesale price averages 1,500 yen per 24 piece flat, which occasionally drops to as low as 1,200 yen.

Avocados from the United States and other industrialized GATT countries face a 6 percent ad valorem tariff, charged on a CIF basis. Avocados from Mexico and other countries listed under the Generalized System of Preference are imported with a 4 percent ad valorem duty, CIF.

Mexico

Mexico is the largest producer of avocados in the world, accounting for about 45 percent of global production. In marketing year 1993/94 (August/July), Mexico's avocado production is estimated at 756,000 metric tons, up 4 percent from the level produced in the previous season. This production increase is a result of better weather conditions, more trees coming into production, and higher production in the alternate production year cycle. In marketing year 1992/93 avocado production was affected by bad weather conditions caused by El Nino.

Over 85 percent of the avocados produced in Mexico are grown in the state of Michoacan, with the rest of the production coming from the states of Puebla, Nayarit, Mexico, and Morelos. The main avocado variety in Mexico is the Hass.

Other less important varieties are Criollo, Fuerte, San Miguel, and Taylor. The peak harvest season for Mochoacan is from October to February. However, there is avocado production year-round in Mexico, depending on the variety and the state.

Avocado trees in Mexico need about 3 to 4 years to reach initial production. Average avocado tree planting density is 120 to 160 trees per hectare. Sources indicate that about 20 percent of the avocado area in Michoacan has non-bearing trees. In 1993, planted avocado area in Mexico totaled almost 95,000 hectares of which 88,000 hectares were harvested.

Field conditions vary from flat areas to hill sides. Most of the groves are planted under a wide variety of microclimates varying from 1,200 meters to 2,200 meters (3,900 to 7,200 feet) above sea level. Grove size varies from several hectares to about 100 hectares. Over 50 percent of the orchards in Mexico are irrigated.

For this crop year the water availability in Michoacan is normal. More than 50 percent of the orchards in Michoacan have irrigation systems, comprised exclusively of well water. Also avocados are grown in Michoacan state because there are few economically attractive alternative crops, and the climate, temperature and water conditions are the most appropriate for avocados.

The quality, size and flavor of avocados for marketing year 1993/94 reportedly is good. Adequate rainfall and no frosts during the marketing year were the major factors contributing to the good quality of this season's crop.

Avocado prices in the domestic market have been generally low and production costs continue to increase. Thus, some growers have reduced input utilization and cultural practices or have tried to become more efficient in order to keep costs down.

Mexican growers indicate that the most expensive input costs in producing avocados continue to be fertilizers, herbicides and fungicides. The prices for these inputs are expected to increase by the rate of inflation, which is estimated to be under 8 percent for

1994. Almost all Government of Mexico (GOM) input subsidies have now been eliminated. However, the GOM removed import tariffs for most inputs, including machinery, fertilizers, and pesticides in March 1993, which has partially offset the effects of the removal of input subsidies.

Most avocados in Mexico are produced for the fresh market. In marketing year 1993/94 domestic avocado consumption accounted for approximately 97 percent of total production. Avocado prices in the domestic wholesale market in January 1994 were US \$.52 per kilogram, compared to US \$.51 per kilogram in January 1993.

Mexican exports of avocados for marketing year 1993/94 are estimated at 20,000 tons, up 8 percent from the previous season. Prevailing good weather and continued attractive international prices are the reasons for this increase. Growers are becoming more concerned about export opportunities and are trying to address phytosanitary issues in order to have better access to foreign markets. Europe, Canada, and Japan are Mexico's largest export markets for avocados.

A phytosanitary ban prohibits Mexican fresh avocados from entering the United States, except in Alaska. Producers do not anticipate significant shipments to Alaska because there is almost no demand for avocados in that state. Avocados from Mexico in transit to Canada are trucked through the United States in sealed containers. Exports to Canada take place predominantly from December to May.

Mexican Plant Health officials are currently undertaking field studies to conclusively determine the risk of introducing pests of quarantine concern into the United States.

While fresh avocados from Mexico are not permitted entry into most states in the United States, Mexican export data show shipments to the United States. These shipments are likely transshipments to other countries. In 1992, Mexico exported just over 18,000 tons of fresh avocados, of which 3,700 tons were reported to have been shipped to the United States, 7,300 tons to France, 2,700 tons to Canada, and 4,700 tons to other countries. The United States

Bureau of the Census data show that an average of about 5,000 tons of processed avocados are imported into the United States on a calendar year basis. Reportedly, Mexico does not register these data in their trade reports.

Virtually all of the avocados destined for domestic consumption pass through the various wholesale markets throughout Mexico. Mexican wholesale distributors sell avocados to supermarkets, chain stores, hotels and restaurants. Handling of fresh avocados in chain stores and supermarkets is still poor, and fruit spoilage on the shelf continues to be a problem. Avocados imported into Mexico are subject to a 20 percent import tax, except for the United States, where under the new NAFTA regulations, there is a US 11.8 cents per kilogram tariff. This tariff will be phased out in 10 years.

United States

Avocado production in the United States in marketing year 1992/93 (November 1 to October 31) totaled 264,491 metric tons, up 58 percent from the previous season. Production in California totaled 257,642 tons, followed by Florida with 6,532 tons, and Hawaii with 317 tons. Production in California during the 1992/93 season, unlike Florida, experienced very good weather conditions during most of the growing season which resulted in a record crop. According to the California Avocado Commission, California's cyclical avocado production during marketing year 1993/94 is forecast at 160,000 metric tons.

More than 90 percent of California's avocado production is located in Southern California counties, including San Diego, Ventura, Riverside, and Santa Barbara. In 1992/93, California avocado acreage totaled 72,900 acres (29,514 hectares), compared to 75,000 acres (30,360 hectares) in 1989/90. The Hass variety is California's primary export variety, and has averaged 92 percent of the state's total crop value over the past three years. Reportedly, better farming practices will contribute to continual increases in California's Hass production in the future.

Florida's avocado production during the 1992/93 season suffered a tremendous loss due to

Hurricane Andrew which destroyed many acres of avocado trees, and caused fruit shipments virtually to stop following the storm. Bearing acreage in Florida in 1992/93, before Hurricane Andrew, was estimated at 8,400 acres (3,401 hectares). The 1993/94 bearing acreage is forecast at 6,100 acres (2,470 hectares).

In 1992/93 Hawaii's avocado harvest was set back by several factors; adverse weather conditions and reduced acreage caused by several years of dry weather and acreage abandonment.

United States: Production, season-average grower price, and value by state, 1988/89 to 1992/93

<u>Season 1/</u>	<u>California</u>			<u>Florida</u>			<u>U.S. Total 2/</u>		
	<u>Production</u> M.T.	<u>Price</u> \$/ton	<u>Value</u> \$Mil.	<u>Production</u> M.T.	<u>Price</u> \$/ton	<u>Value</u> \$Mil.	<u>Production</u> M.T.	<u>Price</u> \$/ton	<u>Value</u> \$Mil.
1988/89	149,686	1,389	208	24,494	481	12	174,725	1,260	220
1989/90	95,255	2,513	239	30,391	366	11	126,145	1,990	251
1990/91	123,378	1,554	192	17,781	754	13	141,567	1,452	206
1991/92	141,522	1,290	183	25,674	525	13	167,576	1,172	196
1992/93	257,642	441	114	6,532	583	4	264,491	447	118

1/ Season beginning Nov. 1 to Nov. 30 (following year) for California; and June 20 to Feb. 28 for Florida.
2/ Includes Hawaii. Source: National Agricultural Statistical Service, USDA.

In marketing year 1992/93 (November 1, 1992 to October 31, 1993), U.S. exports of fresh avocados were valued at \$14.5 million, up dramatically from \$9.2 million registered during the previous season. This increase in exports was due primarily to a bumper U.S. harvest in 1993. Canada continued to lead U.S. avocado export destinations, accounting for 32 percent of total value in marketing year 1992/93. The share of total value of U.S. avocados shipped to other markets included Japan, 23 percent; the United Kingdom, 15 percent; France, 19 percent; and Sweden, 3 percent. However, the most dramatic turnaround for U.S. exports in marketing year 1992/93 was the recapturing of significant shares of the U.K. and French markets. U.S. export values to these markets rose 299 percent and 350 percent, respectively. U.S. exports to

the United Kingdom were triggered by an increase in available U.S. supplies spurred by the bumper 1993 avocado crop and an active MPP program. While the rise in shipments to France occurred mainly as a result of abundant U.S. supplies and good quality fruit.

U.S. imports of fresh avocados during marketing year 1992/93 were valued at \$8.3 million dollars, down 56 percent from the previous season. This decline was also attributed to abundant U.S. supplies stemming from a large U.S. harvest in 1993. Imports from Chile, although down dramatically in 1992/93, continued to hold the lion's share of the U.S. market accounting for 55 percent of the total import value. Imports from Dominican Republic accounted for 31 percent.

**United States: Fresh Avocado Exports 1/
(\$1,000 Dollars)**

<u>Destinations</u>	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u>	<u>1992/93</u>
Canada	4,628	3,845	4,112	4,615
United Kingdom	365	475	533	2,129
Netherlands	3	8	312	642
France	55	19	624	2,811
Spain	0	0	0	189
Sweden	3	0	15	465
Taiwan	9	0	0	103
Japan	2,151	2,074	3,492	3,334
Others	235	217	79	184
Total World	7,449	6,638	9,167	14,472

1/ Season beginning November 1 (current year) to October 31 (following year).

Source: Bureau of the Census, Department of Commerce.

**United States: Fresh Avocado Imports
(\$1,000 Dollars)**

<u>Origins</u>	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u>	<u>1992/93</u>
Dominican Rep.	549	964	2,099	2,573
Chile	15,238	14,336	15,393	4,579
Mexico	37	547	1,375	951
Bahamas	17	86	30	128
Jamaica & Dep.	0	0	4	25
Israel	0	0	0	8
Others	5	30	56	3
Total World	15,846	15,963	18,957	8,267

1/ Season beginning November 1 (current year) to October 31 (following year).

Source: Bureau of the Census, Department of Commerce.

**United States: Prepared Avocado Imports
(\$1,000 Dollars)**

<u>Origins</u>	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u>	<u>1992/93</u>
Mexico	3,879	9,662	11,750	13,166
Others	0	29	27	22
Total World	3,879	9,691	11,777	13,188

1/ Season beginning November 1 (current year) to October 31 (following year).

Source: Bureau of the Census, Department of Commerce.

(For further information on supply, distribution, and trade, contact Emanuel McNeil at 202-720-2083. For information on production, contact Kelly Kirby at 202-720-6791.)

Table Grape Situation and Outlook for Selected Countries

Selected-country table grape exports for 1993 are revised downward from the previous estimate to 1.5 million tons, about two percent below the previous year based on lower production in Argentina and South Africa and tighter exportable supplies in Greece and Italy. On the other hand, U.S. table grape exports for 1993 are revised upward slightly to 203,813 tons, the highest level in three years. Also, India has emerged as an exporter of small quantities of table grapes to selected EU markets. Initial indications from Southern Hemisphere countries suggest higher production in 1994. The combined forecast for production in Chile, Argentina, and South Africa is 1.1 million tons, about three percent above 1993 levels. Exports from all three countries are expected to rise in 1994.

This report updates the 1993 situation presented in the November 1993 issue of Horticultural Products Review (FHORT 11-93) and presents an outlook for the Southern Hemisphere in 1994. It is too early to make reliable forecasts for Northern Hemisphere countries in 1994.

Southern Hemisphere

Argentina, Chile, and South Africa

Argentina, South Africa, and Chile are all forecast to have larger grape harvests in 1994. Collectively, the Southern Hemisphere producers account for about a third of global trade in table grapes each year. Over the past several years, U.S. growers have adjusted to this bipolar production by switching to varieties that complement, rather than compete with, exportable supplies from the Southern Hemisphere. This has been key to the good health of the U.S. industry, as Southern Hemisphere producers are primarily export oriented.

Table grape production in Argentina is expected to rebound from last season's frost-reduced crop to 120,000 tons, up about nine percent from 1993, but still below the 5-year average. Production in South Africa is forecast to recover in 1994 to a record 133,000 tons, as weather conditions return to normal. South Africa's table grape exports have averaged about 60 percent of

production over the past three years. Table grape production in Chile, the largest Southern Hemisphere exporter of table grapes, is forecast to reach 860,000 tons, a slight increase over 1993. In 1993, about 63 percent of Chile's table grape exports went to the United States. Chile is attempting to diversify and broaden its export markets for table grapes.

Northern Hemisphere

United States

The official U.S. crop estimate for table grapes in 1993 is 705,200 tons, less than one percent above 1992 production. Exports during calendar 1993 recovered to almost 204,000 tons, as a more normal harvest period distributed supplies later into the export season. About 59 percent of total U.S. table grape exports in 1993 were shipped to NAFTA neighbors. This share could grow in coming seasons as tariffs are reduced and Mexico's economic reforms contribute to, higher incomes and increased consumer spending.

Although currently small in relation to Canada, Mexico offers tremendous potential as an export market for U.S. table grapes. Growth in Mexico is somewhat constrained by high import duties (18 percent) that will be phased out over the next nine years under NAFTA. Mexico applies import duties on fresh grapes during the peak

months of U.S. export availabilities (June 1-October 15). The U.S. table grape industry requested faster reductions in Mexico's import duties under NAFTA's Accelerated Tariff Reduction provisions. According to U.S. industry sources, there is some support from Mexican growers for a reduction in the import duty on fresh grapes.

Mexico is the second largest supplier of fresh grapes to the United States, shipping 41,305

tons or about 13 percent of total imports in 1993. Mexican table grapes do not face import duties in the United States. The table below shows the growth in U.S. table grape shipments to Mexico in the pre-NAFTA period. The increase in shipments in 1993 (primarily of Red Globe and Thompson Seedless) reflects the replacement of import licensing restrictions with a pre-NAFTA quota, general economic improvement in Mexico, and the conclusion of the phytosanitary agreement between the two governments.

U.S. Table Grape Trade with Mexico (Calendar Years, 1989-1993; Metric Tons)

	1989	1990	1991	1992	1993
Imports	25,756	26,192	42,896	37,056	41,305
Exports	1,553	2,245	3,813	2,562	9,001

Source: U.S. Census Data.

Southeast Asia is one of the fastest growing regional markets for U.S. table grapes. Exports to the region have doubled in the last four years to slightly over 22,000 tons. Although representing only about 10 percent of total U.S. export volume, Southeast Asia is a region with

tremendous potential for growth. Hong Kong and Taiwan, while larger, are mature markets and do not hold as much promise for growth. Exports to Thailand, Indonesia, Malaysia, and the Philippines are currently flourishing despite high tariffs.

U.S. Exports of Table Grapes to Selected Southeast Asian Markets (Calendar Years, 1989-1993; Metric Tons)

Market	1989	1990	1991	1992	1993
Thailand	116	289	303	531	1,139
Malaysia	1,029	1,575	2,132	2,676	4,018
Singapore	5,245	5,626	6,478	5,587	6,655
Philippines 1/	5,378	2,904	4,084	5,531	5,955
Indonesia 2/	0	296	2,073	2,629	4,357
TOTAL	11,768	10,690	15,070	16,954	22,124

Source: U.S. Census data.

1/ Philippine market opened in 1988; 1989 volume reflects rush to import; 1990 decline due in part to medfly-related ban on U.S. grapes during season.

2/ Indonesian market opened June 1991; imports in 1990 are from limited quota.

India Emerges as Table Grape Exporter to Europe

India has recently entered the export market with high-quality Thompson Seedless grapes for the UK and other EU countries. Although the volumes are currently small, the potential for development of the export grape industry seems bright. Industry sources forecast exports will reach 7,000 to 8,000 tons during the current season (February-April), up from about 1,000 tons of experimental shipments in 1993. Speculation on prospects for 1995 suggests that exports of 20,000 tons of table grapes to the EU are not unreasonable.

The high plains area of the Nasik and Pune districts in Maharashtra state, northwest of Bombay, is the center of India's fledgling export grape industry. India's emergence as an

exporter is assisted by: 1) government economic reforms; 2) a small GOI market promotion fund (\$2.5 million); 3) a modern container port; and, 4) access to upscale niche markets in Europe. At its present state of development, India's export grape industry is not a threat to U.S. shipments (Thompson Seedless) to the lucrative UK market. In fact, it is complementary and probably helps to stimulate demand during the months prior to early-season shipments of U.S. grapes. However, exports from India during February-March will likely displace some grape shipments from Southern Hemisphere suppliers such as Chile or Australia. Moreover, future efforts to extend the Indian export season could add downward pressure on prices of early-season U.S. grapes in the UK market. Thus, the tremendous potential of India as a grape supplier requires further observation.

**Indian Exports of Table Grapes 1/
(Calendar Years, 1991-1995; Metric Tons)**

Market	1991	1992	1993	1994	1995
Gulf	5,300	11,000	12,500	12,500	15,000
UK 2/	0	0	1,000	8,000	15,000

Source: GOI data for 1991 and 1992; forecasts for 1994 and 1995 based on discussions with exporters and industry sources.

1/ Exports are primarily Thompson Seedless variety.

2/ For 1993, exports to UK; for 1994 and 1995, assumes additional EU markets.

India has exported grapes from Maharashtra to neighboring Sri Lanka and the Gulf states (e.g., Dubai and Saudi Arabia) for decades. Most of this trade is in non-refrigerated bulk ships and organized among the expatriate Indian communities in these countries. This traditional trade did not require high standards. In contrast, the new export grape industry incorporates modern viticultural and packing technology, and is plugged into electronic market information. It is in the process of improving the export infrastructure and establishing a reputation for quality and high standards. The 1994 season will be pivotal to this effort. Buyers are coming to Maharashtra from the UK to supervise operations from harvesting and packing straight through to the stuffing of containers bound for retail outlets such as Marks & Spencer and J.

Sainsbury. In addition to the UK, Germany, and the Netherlands, Indian grape exporters hope to target Southeast Asian markets. Trial shipments are reportedly planned for Singapore this year.

There has been a rush of entrants into the export grape industry. In the Nasik area there are six packing plants and cold storage facilities under construction, with several others in planning stages. Nasik also supports over 50 mobile and stationary pre-cooling facilities for various fruits and vegetables. Some industry sources have expressed concern that the business is overheating. They suggest that half the estimated 40 exporters currently operating in Maharashtra will leave after this season. Most large-scale operators have located packing houses adjacent to vineyards. Some exporters

are vertically integrated back to the vineyards, although contract growing is also very popular. This is in part due to reportedly cumbersome land tenure laws in Maharashtra that limit the size of holdings.

Estimates of India's grape production vary widely. Production in Maharashtra in 1991/92 is estimated by the GOI at 341,000 tons from a harvested area of about 15,000 hectares. Harvest begins in February and ends in May, with the peak occurring March and April. According to local Nasik growers, the average vineyard is about 10 hectares. One factor limiting the production of large (18-20 mm) grapes is the

quality of plant material, most of which is vegetatively propagated. In an effort to upgrade genetic potential of vineyards, private industry is importing small quantities of root stock from the United States and France. There is also some concern about soil salinity and the adequacy of irrigation supplies. Assuming India is able to cope with these agronomic challenges, there is great scope for abundant supplies of high-quality grapes for the export market.

(For further information on supply, distribution, and trade, contact Ross Kreamer at 202-720-9903. For information on production, contact Kelly Kirby at 202-720-6791.)

**TABLE GRAPES: PRODUCTION, IMPORTS & EXPORTS
IN SELECTED COUNTRIES
(Metric Tons)**

COUNTRY/ YEAR 1/	PRODUCTION	IMPORTS	EXPORTS
N O R T H E R N H E M I S P H E R E			
France			
1991	70,400	162,900	11,100
1992	79,800	156,900	13,300
1993	107,000	150,000	25,000
1994	n/a	n/a	n/a
Greece			
1991	373,672	211	109,298
1992	325,198	233	106,881
1993	368,000	250	100,000
1994	n/a	n/a	n/a
Italy			
1991	1,410,790	11,390	461,090
1992	1,678,000	11,515	513,840
1993	1,650,000	17,000	510,000
1994	n/a	n/a	n/a
Japan			
1991	270,600	7,600	0
1992	276,100	7,700	0
1993	279,300	8,000	0
1994	n/a	n/a	n/a
Mexico			
1991	345,000	4,000	45,000
1992	285,000	13,600	42,000
1993	270,000	23,000	50,000
1994	n/a	n/a	n/a
Spain			
1991	461,600	2,900	115,900
1992	428,900	4,100	123,300
1993	396,300	4,500	115,000
1994	n/a	n/a	n/a
United States 2/			
1991	726,110	332,475	200,327
1992	697,600	316,919	189,831
1993	705,200	321,467	203,813
1994	n/a	n/a	n/a
SUBTOTAL			
1991	3,658,172	521,476	942,715
1992	3,770,598	510,967	989,152
1993	3,775,800	524,217	1,003,813
1994	n/a	n/a	n/a
=====			
S O U T H E R N H E M I S P H E R E			
Argentina			
1991	160,000	0	11,663
1992	150,000	0	6,984
1993	110,000	0	4,500
19943/	120,000	0	6,000
Chile			
1991	795,000	0	423,000
1992	795,000	0	429,000
1993	855,000	0	418,000
19943/	860,000	0	425,000
South Africa			
1991	112,212	0	65,313
1992	127,100	0	77,607
1993	116,075	0	67,075
19943/	133,000	0	80,000
SUBTOTAL			
1991	1,067,200	0	499,976
1992	1,072,100	0	513,591
1993	1,081,100	0	489,575
19943/	1,113,000	0	511,000
=====			
T O T A L S E L E C T E D C O U N T R I E S			
1991	4,725,400	521,476	1,442,691
1992	4,842,700	510,967	1,502,743
1993	4,856,900	524,217	1,493,388
1994	n/a	n/a	n/a

1/ Calendar year for all countries except Chile, for which the year begins in the previous December (i.e., December 1992 for the "1993" year). All data for 1993 are estimates.

Production forecasts for 1994 for northern hemisphere countries not available until October 1994.

2/ U.S. export data include substantial quantities that are re-exported. U.S. trade data for 1989 and 1990 have been revised as follows: 1989 imports = 280,723 tons; 1989 exports = 191,887 tons; 1990 imports = 373,553 tons; 1990 exports = 205,562.

3/ Forecast.

KIWIFRUIT PRODUCTION AND TRADE SITUATION IN SELECTED COUNTRIES

The world kiwifruit situation is characterized by bipolar production, with the harvest in the Northern Hemisphere (October-November) generally complementing supplies harvested in the Southern Hemisphere (April-June). Kiwifruit production and trade in 10 major producing countries have increased dramatically over the past decade, especially in the European Union (EU). By the end of the 1980s, production had far outpaced demand from the importing countries. This situation led to considerable vine-pulling and generally slower growth in planted area. Increases in world kiwifruit production combined with improved storage facilities and technology (e.g., controlled atmosphere storage) have allowed sales in the Northern and Southern Hemispheres to overlap, leading to downward price pressure. While devastating to many farmers in certain regions, the lower level of prices has probably helped boost kiwifruit consumption around the world. Exports of U.S. kiwifruit in 1993/94 are expected to reach 8,800 tons, an increase of about five percent over the previous year. In coming years the kiwifruit industry will focus efforts on how to balance supplies with demand, while seeking adequate returns to growers. Part of the task will be to stimulate demand among both importing and exporting countries. This is crucial given the potential for production increases in coming years.

World kiwifruit production for 1993/94 is forecast at 858,700 tons, an eight percent decline from last year's record, but still higher than the level of 1991/92. Increased demand and attractive prices are expected to boost exports in 1993/94 to about 517,800 tons, up about seven percent from 1992/93. This report updates information presented in our April 1992 publication (FHORT 4-92; pp 15-29).

Northern Hemisphere

The European Union (EU) is the world's most important kiwifruit growing region. Italy dominates EU production. The EU greatly facilitated conversion of crop land to kiwifruit in the 1980s through widespread application of subsidies. Although most subsidies have reportedly been eliminated, their impact has been enormous. Current estimated production in 1993/94 for selected EU countries is about 452,000 tons, almost 11 times the level estimated for the United States this season. Despite its huge production, the EU remains a net importer of kiwifruit. Net imports of kiwifruit in the EU, excluding intra-EC trade, totaled about 56,000 tons in 1992.

Italy

Italy is the goliath of world kiwifruit production, accounting for about 58 percent of total production from selected northern hemisphere countries in 1993/94. The 1993/94 crop is estimated at 310,000 tons, a decline of 20 percent from the previous year's record crop, which benefitted from ideal weather conditions and high yields. This season's crop was negatively affected by a dry summer and a wet autumn. As with other EU producers, Italy's entry into kiwifruit is comparatively recent, dating from the 1980s. During the last decade some of Italy's regional governments provided subsidies for planting alternative horticultural crops, including kiwifruit. However, these subsidies have reportedly been suspended as a means of guarding against over-planting. Area planted to kiwifruit has stabilized at 20,000 hectares, concentrated in the regions of Lazio (6,000 hectares), Emilia-Romagna (4,650 hectares), and Piedmont (3,000 hectares). Currently there are no EU or Italian government subsidies specifically covering kiwifruit production.

Kiwifruit consumption in Italy closely parallels production. In general, the domestic market is very price-sensitive. Recently, local kiwifruit producers have reportedly benefitted from a New

Zealand advertising campaign aimed at increasing Italy's consumption. The Italian Kiwifruit Producers Association (CIK) has not invested in domestic advertising in several years. According to CIK, almost all kiwifruit is sold on the fresh fruit market. There is very little further processing, although small quantities are diverted to confectioners and frozen fruit juice manufacturers.

Italy's exports explode from 1988 levels; future somewhat fuzzy.

Italian kiwifruit exports continue to expand. Exports in marketing year 1993/94 are forecast to reach 200,000 tons, a meteoric rise considering that Italy did not have an exportable surplus of kiwifruit as late as 1987. Given the overall stagnant demand for kiwifruit and the reportedly stable area planted, Italy is not likely to register huge gains in exports in coming years. Italy's primary export markets are other EU countries. In 1992, shipments to other EU destinations accounted for about 76 percent of total exports. Outside the EU, Italy has developed markets in other western European countries (Austria, Sweden, and Switzerland), as well as in former Czechoslovakia and Canada.

Despite its dominant position in export markets, Italy is also an importer of kiwifruit during the off season from May through October. Italy imported 20,000 tons of kiwifruit in 1992/93, and is expected to take 15,000 tons in the current marketing year. The decline in imports is in part due to adequate availabilities of locally produced kiwifruit on the domestic market. Chile and New Zealand are the major suppliers of imported kiwifruit to Italy, collectively contributing about 75 percent of total imports during 1992/93. In view of the bipolar production season, Chile and New Zealand will remain the primary beneficiaries of import demand from Italy. However, the length of season in coming years could be affected by technological advances in controlled atmosphere storage and forced maturation.

France

France is the EC's second largest kiwifruit

producer, with an estimated 60,000 tons harvested for 1993/94. Kiwifruit outturn in France has almost quadrupled in six years. Production this year is unchanged from the previous year, as expansion of area planted appears to have stopped. French Customs data show that it is a net importer of kiwifruit, taking almost 90 percent of deliveries from other EU countries. Some of France's trade are transshipments across its borders. One of the features of France's imports has been the decreasing role of third country suppliers and the displacement of New Zealand by Chile as its largest off-season source of kiwifruit.

Greece

Production in 1993/94 is estimated at 32,000 tons, down 20 percent from the record level in the preceding year. Moisture problems during the growing season resulted in poor bud development and pollination problems, and led to lower yields and smaller fruit size.

Greece responded to very favorable world prices and jumped into the kiwifruit industry in the 1980s along with many other EU countries. Rapid expansion led to higher availabilities of fresh kiwifruit and substantially lower prices. This situation has helped to stabilize crop area and no further expansion in planted area is currently anticipated for Greece. Planted area is estimated at 4,800 hectares for 1993/94. Kiwifruit production is centered in Western and Central Macedonia, particularly in the district of Pieria, which accounted for 2,200 hectares in 1992/93. Over the past few years, Greek growers have sustained marked declines in returns, which resulted in heavy losses. This has reportedly led some growers to either abandon plots or cut corners in tending some orchards. Thus, the next few years will be crucial for the domestic Greek industry in terms of area planted. Persistent low prices could result in some shifting out of kiwifruit.

Kiwifruit exports from Greece rocketed to about 19,400 tons in marketing year 1992/93, due largely to higher production. For 1993/94, shipments are forecast to slip to about 15,000 tons, based on a weather-reduced crop and lower exportable supplies. In 1992, almost 76 percent

of Greek kiwifruit exports were shipped to EU member states, the balance going to markets in Eastern Europe. Difficulties in former Yugoslavia dramatically pared exports to that market in 1993 and forced shippers to redirect cargoes through Bulgaria, Hungary or Italy. In an effort to meet the rise in freight costs resulting from this change in shipping patterns, the EU approved a special aid package of 2.3 ECU/100 kg through the end of September 1993, and increased the rate to 4.0 ECU/100 kg effective October 1, 1993. This action applies to shipments to EU countries of Northern Europe, excluding Italy, France, Spain, and Portugal.

Greece imports only small quantities of kiwifruit, usually during the July-September period when

locally produced kiwifruit are in limited supply. Imports are forecast to reach about 500 tons in 1993/94. Imports tend to come from EU suppliers because no import duties are levied on kiwifruit from other EU countries. The import duty on kiwifruit from non-EU countries is generally 11 percent of CIF value; however, for supplies from Lome Convention countries and certain Mediterranean countries during the period January 1- April 30, the import duty is zero. There is a VAT of eight percent based on CIF value on imports from all origins. Season average 1992 import prices (inclusive of all duties and taxes) recorded at Athens Central Market for four representative suppliers are presented below.

Greece: Average 1992 Kiwifruit Import Prices

Netherlands	\$1.88/kg
Italy	\$1.68/kg
Chile	\$2.11/kg
New Zealand	\$2.42/kg

Wholesale Price 1/	\$2.66/kg

1/ May-September season.

Source: USDA/FAS attache report

Note: Netherlands data represent third country imports through Rotterdam.

A new packing house with cold storage facilities (2,000 ton capacity) became operational in 1993/94 in the main growing area of Pieria. This follows a similar such facility in Pieria established in 1985 by the Union of Agricultural Cooperatives to help develop the industry. The introduction and expansion of kiwifruit since 1985 has been under the close supervision of the Greek government. Currently there are no price supports for kiwifruit, and no subsidized producer credit is available. The Integrated Mediterranean Programs (EC Regulation No 2088/85), which covered the important period 1987-1992, has been terminated. EC Regulation No 2328/91 replaces the Modernization of Agricultural Operations program (EC Reg. No 797/85) and does not encourage new kiwifruit plantings.

Portugal

Kiwifruit was introduced to Portugal as an experimental crop in the early 1970s but only began to expand after Portugal's accession to the EU in 1986. As an EU member, Portugal was able to take advantage of subsidies on investment costs. Kiwifruit production increased in 1991/92 and 1992/93, in large part due to maturing vines. Area harvested continued to expand in 1993/94; however, intense rainfall and low temperatures during flowering contributed to a lower crop, estimated at 9,000 tons, down 10 percent from the previous year. Further expansion is anticipated in 1994/95, as areas planted three to four years ago come into production. Despite the dramatic fall in producer prices over the past four seasons, kiwifruit is likely to remain an important feature of Portugal's agriculture as it is one of the few economically

viable crops. Further rises in production are likely in the future, as about 30 percent of planted area reportedly has yet to bear fruit.

Consumption of fresh kiwifruit has been trending upward in line with increased domestic availabilities and lower retail prices. Consumer purchases are influenced by prices and supplies of other fruit (apples in winter, bananas in summer). Appearance of fruit is reportedly an important factor in influencing consumer decisions. Marketing efforts are likely to be strengthened by the efforts of a recently formed growers' association comprised of six leading companies. This organization seeks to establish a common marketing strategy and assure continuity of supply by: 1) setting weekly producer prices; and 2) coordinating the import program. If successful, this organization could contribute to more even distribution of kiwifruit throughout the year, stable prices, and higher domestic demand.

Portugal was a comparatively large net importer of kiwifruit in 1992/93, and is expected to import record quantities again in the current year. Imports in 1993/94 are currently forecast to reach 12,000 tons, primarily from Italy, France, and New Zealand. In future years, however, imports are likely to stagnate at current levels or

even decline as Portugal's domestic production begins to pick up. Kiwifruit exports in 1993/94 are forecast to reach 700 tons, a 17 percent increase over the year earlier period. Other EU countries (Spain and the UK) are Portugal's primary export markets.

Spain

Spain's Ministry of Agriculture recently completed its first-ever survey of kiwifruit area and production. Estimates of previous years' production and area planted and harvested are not available. Galacia (northwestern Spain) is the primary production area accounting for about 58 percent of total planted area. Estimates for 1993/94 are 810 hectares planted, 643 hectares harvested, and 10,800 tons produced. Production for 1994/95 is forecast at about the same levels, as no significant increase in area harvested is expected. Moreover, unless kiwifruit grower prices improve, there could some pulling of kiwifruit vines in areas of mixed production (kiwifruit/grapes) and replanting with grapes. Wine grapes reportedly offer growers better returns than kiwifruit at current prices. The following table presents grower prices over the past several years and shows the decline in grower position.

Prices Received by Spanish Kiwifruit Growers

<u>Year</u>	<u>\$/kg</u>
1991/92	0.96
1992/93	0.78
1993/94	0.47

Source: USDA/FAS attache report

Spain still offers incentives to kiwifruit producers. Some regional governments have set up an annual aid budget based on hectares of kiwifruit planted. Aid is based on whether the farmer is full-time or part-time, or is a member of a cooperative. Full-time cooperative members receive the highest share of assistance. Some regional governments offer subsidized loans of 3-4 percent below market interest rates to first time kiwifruit farmers.

Spain is primarily an importer of kiwifruit. Imports in 1992 reached 37,300 tons, a rise of 28 percent over the previous year. This is a noteworthy increase given that Spain began importing kiwifruit only five years ago. During January-July 1993, imports stood at 31,000 tons, an indication of another record year based on the pace of deliveries. Italy and France are the primary suppliers of kiwifruit to Spain, followed by New Zealand and Chile. Local

kiwifruit are marketed by only a few Galicia-based firms, mainly from November through February. Imports from Italy and Spain usually take place November through May, while fruit from Chile and New Zealand typically arrive June through December. Although a ban on U.S. fresh fruit was lifted in mid-1993, prospects for U.S. kiwifruit in this market are limited given strong competition from low-price EU neighbors during the export season.

Japan

Kiwifruit production in 1993/94 is estimated at 57,600 tons, a seven percent increase from the previous year. Production in Japan has rebounded steadily due to an absence of climatic disasters which have visited the islands since the record crop of 68,900 tons in 1990/91. Typhoon activity during 1993/94 brought intensive rainfall and low temperatures which contributed to small fruit size. A recent Japanese industry survey revealed that planted area fell five percent in 1993/94 from the previous year, the first decline ever registered for kiwifruit. This unexpected decline was triggered by continued saturation of the kiwifruit market due to stagnant consumer demand and increasing domestic production and imports. Over the long term, Japanese production is expected to continue increasing, although it may not reach the government's goal of 83,000 tons by the end of the century.

Japan's kiwifruit imports of 52,300 tons in 1992/93 were slightly below the level of domestic production that year. Earlier U.S. concern that Japan would become a regional exporter of kiwifruit appears to have receded due to persistent quality problems. Imports in 1993/94 are forecast to fall about 12 percent on slightly higher local outturn and slack demand. Imports come primarily from New Zealand, in large part due to its complementary season and proximity. Interest in U.S. kiwifruit is usually limited, as it competes directly with local Japanese production. In general, the current economic situation in Japan will likely dampen prospects for New Zealand kiwifruit in the upcoming season. Part of the problem has been large overhanging stocks and low prices of New Zealand kiwifruit held in Japan by authorized

distributors. One large-scale distributor reportedly destroyed about 100,000 trays of poor-condition New Zealand fruit in February. Compounding New Zealand's woes is the entry of Chile in the market for the second year in a row. Chile has pursued an aggressive pricing policy in Japan, reportedly selling kiwifruit for as low as one-third the price of New Zealand fruit. U.S. prospects, although limited, are reportedly best for especially high quality fruit given the small size of fruit from Japan's 1993 crop.

United States

The U.S. commercial kiwifruit industry is based around Gridley, in northern California. Kiwifruit production in 1993/94 is estimated at 41,100 tons, a 13-percent decline from the previous year. Falling domestic and world prices led to a reduction in area planted in 1993/94, the first decline since commercial production began in the early 1980s. Domestic prices fell from \$904/ton in 1991/92 to \$331/ton the following year. This collapse in prices forced some growers to pull vines and plant other crops. Bearing area for the crop harvested in 1993 (October and November) is estimated at 2,794 hectares.

Prospects have improved during the current marketing year. Record shipments were registered for the months of November 1993 through January 1994. At the start of March, the U.S. kiwifruit industry had only about 2.4 million trays (about 7,700 tons) left in cold storage. In an effort to boost consumer awareness and demand, the California Kiwifruit Commission (CKC) undertakes promotional campaigns both in the United States and in export markets. A new twist on this approach is a proposed joint U.S./Chile marketing effort that could begin as early as 1995. This concept is focused primarily on the United States and Canada, and would be financed through an assessment on growers and importers.

Total U.S. exports of kiwifruit during calendar 1993 reached 8,884 tons, a 25 percent increase over the previous year. However, the value of exports in 1993 was approximately \$12.9 million, a 4-percent drop from the level in 1992. Among the major markets for U.S. kiwifruit are Canada, Taiwan, and Korea, which collectively

accounted for slightly more than 90 percent of total exports in 1992/93. Thus far in 1993/94, this shipment pattern appears unchanged, with a higher export pace noted for each of the three major markets. In fact, shipments to Canada through February 1994 were 50 percent ahead of last year's pace, and exports to Korea were a whopping six times the year earlier period. Shipments to Hong Kong and Mexico, both steady markets for U.S. kiwifruit, are currently twice the level of last year. Approximately 82 percent of all U.S. kiwifruit marketed during 1992/93 were consumed domestically. For 1993/94 through February, deliveries to the U.S. domestic market were about 12 percent more than the same period last year.

The United States is a net importer of kiwifruit. Imports usually begin in April and end in October when the U.S. crop is harvested. However, improved cold storage technology in major supplying countries has greatly extended the shipping season. This has caused some concern in producing countries, as there is some possibility for pressuring prices downward when old-crop imports compete with new-crop domestic fruit. Chile has emerged as the leading supplier of kiwifruit to the U.S. market since the anti-dumping action against New Zealand was implemented in 1992. The following table shows the development of U.S. imports over the past five years.

United States Kiwifruit Imports, 1989-1993
(metric tons)

Supplier	1989	1990	1991	1992	1993
Chile	1,041	627	3,098	12,311	19,444
New Zealand	18,704	32,735	25,643	7,455	4,783
Italy	0	67	229	470	846
TOTAL	19,745	33,429	29,002	20,236	25,074

Source: U.S. Bureau of Census data

Note: Total for 1991 includes 32 tons of imports recorded from Caribbean.

Italy, the world's largest producer and exporter, has established a small but expanding market in the United States. Italy's kiwifruit competes directly with U.S. domestic production, as imports begin arriving in November. The CKC has made a formal request under Section 308 of the Trade Act of 1988 for specific information on the EU's policies and practices regarding member state kiwifruit industries. According to U.S. Census data, the average value of imported Italian kiwifruit was \$0.83 per kilogram during January through March 1993. In contrast, the average import value of New Zealand kiwifruit was \$1.04 per kilogram during May through October 1993, and Chilean fruit were \$0.56 per kilogram during April through June 1993.

The U.S. Commerce Department's determination of injury to the U.S. domestic kiwifruit industry from imports of New Zealand kiwifruit led to the

imposition of a 98.6 percent anti-dumping duty in May 1992. The dramatic decline in imports from New Zealand in 1992 and 1993 is a direct consequence. The U.S. Customs Service requires a cash deposit or bond equal to the dumping margin on all imports of kiwifruit from New Zealand. A review of the New Zealand kiwifruit industry is currently underway to determine if the anti-dumping duty should remain in effect. The average import value of New Zealand kiwifruit in 1993 was \$1.04 per kilogram.

The following table shows the decline in U.S. grower prices over the past several years. The low level of prices received during 1992 corresponded with the U.S. Commerce Department's anti-dumping action against imports of New Zealand kiwifruit. Prices for 1993 will be available July 8, 1994; industry sources suggest

that prices to growers were lower still in 1993. There is some optimism that this situation could

change for the better in 1994, based on the brisk pace of sales through February.

Season-Average U.S. Kiwifruit Grower Prices, 1986-1992 1/ (\$/MT)

1986	1987	1988	1989	1990	1991	1992
1,093	717	755	408	399	818	292

1/ Average prices producers receive at the point of first sale.

Source: National Agricultural Statistics Service, USDA

Southern Hemisphere Countries

The Southern Hemisphere kiwifruit industry is centered in New Zealand and Chile. Australia, by comparison, is a very small kiwifruit producer.

Collectively, these markets account for about 338,000 tons or 40 percent of world production.

New Zealand

Kiwifruit production in 1993/94 is forecast to decline four percent to 216,800 tons, due in large part to the removal of 1,000 hectares of vines the previous year. The reduction in area is expected to be partially offset by improved yields in the remaining orchards. Pollination and growing conditions were generally favorable. The area of producing vines is now down to 13,000 hectares from a peak of 16,000 hectares in 1988/89.

Kiwifruit Marketing Board (KMB) has established a crop management policy whereby production (packed volume) targets are based on demand from export markets. Packhouses are responsible for determining which grower's fruit not to pick, or which fruit to pick and then store in field bins. The KMB then pays these selected growers the net amount (after picking and packaging costs) it pays to other growers. An inaccurate pre-harvest forecast in 1991/92 led the KMB to conclude that crop management would not be necessary. However, the final crop that year was well above the 60-million tray estimate at 67.3 million trays (242,280 tons). The final export total was 55 million trays (198,000 tons). As a result of this over-supply situation the KMB sustained huge losses, which lowered grower returns on the 1991/92 crop. Although the situation improved in 1992/93, the loan will likely be fully repaid only after the upcoming export campaign beginning in May. The following table presents KMB data on the loan repayment scheme.

New Zealand Kiwifruit Prices 1/(\$NZ/tray = \$NZ/3.6 kg)

	1990	1991	1992	1993
NZ\$/tray farm gate	4.70	6.08	3.85	4.05
NZ\$/tray KMB receipts	4.70	6.08	2.65	5.19

Source: FAS/Wellington and New Zealand KMB data

1/ For 1992, the \$3.85 farm gate price was supplemented by \$1.20 by commercial KMB debt, subsequently repaid in 1993 and 1994. Note: 1992 data are preliminary.

New Zealand is the second largest exporter of kiwifruit after Italy. The KMB exercises control over export sales to all markets except Australia, which usually takes Grade II kiwifruit. Export trade is dominated by shipments to EU countries, with smaller amounts going to Japan and the United States. Collectively, these three markets account for about 83 percent of total exports in 1992/93. Exports in 1993/94 are forecast at 190,000 tons, marginally higher than last year but still well below the 203,000-ton level recorded in 1991/92. Part of the decline is attributable to lower sales to the EU stemming from higher domestic production in Europe. The KMB reportedly has reached an informal agreement with Italy over sharing the lucrative German market. The wild card in analyzing market opportunities in the EU is Greece, where the potential for increased exportable supplies is considerable.

Exports to the United States have fallen almost 50 percent, in part due to the anti-dumping action taken against New Zealand kiwifruit. Some New Zealand industry sources feel the anti-

dumping action unfairly boosted the KMB's U.S. export price, noting that already over \$NZ 19 million has been deposited under the U.S. anti-dumping action. The KMB is reportedly looking into new export markets in Latin America, the Middle East and Asia/Pacific.

Chile

Kiwifruit production in Chile in 1993/94 is forecast to reach 115,000 tons, a 4 percent increase over the previous year on lower harvested area due to better yields. Chile's kiwifruit plantings have stalled as a result of reduced profitability from export sales. Negative returns during the last two years forced marginal growers to pull vines. Planted area is expected to level off at 9,500 hectares; output will likely stabilize at about 130,000 tons, or 15 percent above current production. The following table shows the steady decline in FOB export price over the past three years, a factor contributing to some shifting out of kiwifruit into other crops.

Chile FOB Export Prices for Kiwifruit
(\$US/ton)

<u>1991</u>	<u>1992</u>	<u>1993</u>
1,168	772	672

Source: USDA/FAS attache report

Chile is primarily a kiwifruit exporter, with about 68 percent of total commercial production entering export channels in 1992/93. Shipments in 1993/94 are forecast at 80,000 tons, an increase of slightly more than six percent due to reduced competitor supplies. Chile's major markets are the EU, the United States, Argentina, and Brazil. Traditionally, Chile's export efforts have focused on the EU, although demand is now somewhat diminished as domestic EU production continues to flourish. However, shipments to the United States have expanded rapidly, partly in response to the competitive advantage provided Chile by U.S. anti-dumping duties assessed against New Zealand. Indeed, the United States is now the single largest destination for Chilean kiwifruit. Producers and exporters are reportedly

focusing on quality improvement and expansion of demand in overseas markets, especially Latin America, Japan, and the United States. The Chilean industry initialled an agreement with the California Kiwifruit Commission to undertake joint marketing efforts in the U.S. market (see U.S. section, above).

Imports of kiwifruit and deciduous fruit into Chile are currently prohibited because of phytosanitary concerns. The United States and Chile are working to address these concerns in an effort to provide access for U.S. fruit in Chile. However, U.S. kiwifruit would likely have only a limited market in Chile, as there is only a narrow window of opportunity when supplies of low-cost domestic kiwifruit are not available.

Australia

Australian kiwifruit production in 1993/94 is projected to reach 6,400 tons, a seven percent increase over the previous year. Production of kiwifruit expanded rapidly in Australia in the 1980s, from 500 tons in 1982/83 to 9,500 tons in 1987/88. However, this expansion led to a serious oversupply situation and plummeting prices. Several large operations pulled vines and ceased production in 1989, resulting in a 46-percent decline in planted area. Since 1988/89, planted area has continued to decline gradually, while production has steadily increased due to higher yields from maturing vines. Australian kiwifruit production is concentrated in the states of Victoria, New South Wales, and Queensland. Kiwifruit are harvested from March through May.

Australia imports more than twice as much kiwifruit as it produces. Domestic consumption has increased markedly in recent years as the availability of kiwifruit has increased and the

price has fallen. Imports in 1993/94 are forecast at 13,700 tons, a seven percent slide from last season's record as the moderate increase in low-price domestic production will likely displace some New Zealand kiwifruit. New Zealand dominates the imported kiwifruit market. Although Australian Bureau of Statistics data do not disaggregate kiwifruit imports from the "other fruit" category, a proxy for imports is the official New Zealand KMB export data. For 1993, New Zealand exported 12,539 tons of kiwifruit to Australia, most of it second grade fruit.

Australia exports small amounts of kiwifruit, forecast at 1,200 tons in 1993/94. While Australia has limited early season advantage over New Zealand, prospects for kiwifruit exports are dampened by strong competition from countries such as Chile and the EU producer countries. A lack of direct shipping routes to potential Southeast Asian markets (e.g., Singapore) adds costs and hampers development of regional export markets. Thus, Australia is likely to remain a low-volume exporter.

(For further information on supply, distribution, and trade, contact Ross Kremer at 202-720-9903. For information on production, contact Kelly Kirby at 202-720-6791.)

KIWIFRUIT PRODUCTION AND TRADE IN SELECTED COUNTRIES **October/September Marketing Years 1991/92-1993/94**

COUNTRY	YEAR	PLANTED AREA	PRODUCTION	EXPORTS	IMPORTS
NORTHERN HEMISPHERE 1/					
Italy	1991/92	21,000	309,000	119,000	21,000
	1992/93	20,000	381,000	169,000	19,000
	1993/94	20,000	310,000	200,000	15,000
France	1991/92	n/a	45,000	22,247	33,290
	1992/93	n/a	60,000	22,412	27,799
	1993/94	n/a	60,000	22,500	30,000
Greece	1991/92	4,053	29,700	13,830	876
	1992/93	4,500	40,000	19,393	445
	1993/94	4,800	32,000	15,000	500
Spain	1991/92	n/a	n/a	664	37,084
	1992/93	n/a	n/a	900	46,000
	1993/94	810	10,800	800	50,000
Portugal	1991/92	1,050	5,000	401	8,888
	1992/93	1,050	10,000	600	9,000
	1993/94	1,100	9,000	700	12,000
Japan	1991/92	5,000	45,000	0	42,651
	1992/93	4,950	53,800	0	52,265
	1993/94	4,700	57,600	0	46,000
United States	1991/92	2,955	26,900	7,485	20,171
	1992/93	2,874	47,500	8,359	24,791
	1993/94	2,794	41,100	8,800	28,000
SOUTHERN HEMISPHERE 2/					
New Zealand	1991/92	14,594	275,100	203,000	0
	1992/93	14,000	225,000	187,100	0
	1993/94	13,000	216,800	190,000	0
Chile	1991/92	12,560	99,500	66,410	0
	1992/93	12,770	111,000	75,175	0
	1993/94	11,500	115,000	80,000	0
Totals	1991/92	n/a	840,800	433,037	163,960
	1992/93	n/a	934,300	482,939	179,300
	1993/94	58,704	858,700	517,800	181,500

Note: Production data for Northern Hemisphere countries are estimates; for Southern Hemisphere countries, forecasts.

1/ Northern Hemisphere crop harvested mostly in October-November and marketed December-May.

2/ Southern Hemisphere crop harvested primarily April-June of the second year shown and marketed May-December.

Source: USDA/FAS attache reports; USDA, National Agricultural Statistics Service; and, U.S. Department of Commerce, Bureau of Census.

Note: 1993/94 is forecast.

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
JAN 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL)	MT										
TAIWAN		10,581	15,194	91,449	72,240	113,733	8,156	12,860	64,347	57,373	75,230
MEXICO		10,140	17,572	32,931	49,379	99,364	5,194	10,107	15,929	28,006	49,551
CANADA		7,128	6,929	47,165	44,845	83,089	4,315	5,306	32,962	31,590	55,313
HONG KONG		5,770	8,832	28,072	34,263	47,234	3,144	4,875	16,356	19,733	23,986
OTHER		18,203	29,245	109,695	151,097	145,925	10,843	15,242	70,005	81,784	92,820
Subtotal:-----		51,723	77,772	309,312	351,825	489,346	31,652	48,389	199,599	220,435	300,700
FR. PEARS(JUL)	MT										
CANADA		2,649	2,703	26,705	28,320	34,899	2,020	1,801	18,585	18,872	25,100
MEXICO		3,592	4,845	19,837	25,520	34,222	1,788	2,362	9,614	13,218	17,370
TAIWAN		353	526	3,343	2,757	6,157	245	312	2,301	1,621	4,145
SWEDEN		783	17	1,578	196	6,190	451	16	2,559	2,625	2,657
OTHER		2,852	1,958	16,189	19,132	19,289	1,879	1,054	9,530	10,576	11,673
Subtotal:-----		10,228	10,050	71,652	81,926	100,358	6,382	5,535	42,590	46,581	60,944
APRICOTS(MAY)	MT										
CANADA		22	11	3,074	3,022	3,091	23	14	3,482	4,031	3,508
MEXICO		0	0	479	1,515	497	0	0	370	1,183	394
EU		0	0	463	3,099	2,464	0	0	1,259	6,949	11,520
UNITED KINGDOM		0	0	425	224	426	0	0	1,114	748	1,118
OTHER		2	0	425	305	440	3	0	595	454	630
Subtotal:-----		24	11	4,441	5,151	4,492	26	14	5,705	6,617	5,794
FR. CHERRIES(MAY)	MT										
JAPAN		0	0	12,144	12,467	12,162	0	0	61,981	77,333	61,991
CANADA		7	3	9,578	6,235	9,607	16	9	18,040	13,376	18,106
EU		19	0	9,246	1,900	3,521	13	0	10,988	6,905	11,520
UNITED KINGDOM		0	0	2,634	1,240	2,634	0	0	8,726	4,587	8,726
HONG KONG		0	16	2,553	1,833	2,553	0	24	5,643	5,518	5,643
TAIWAN		0	19	2,081	2,140	2,082	0	30	4,209	4,705	4,211
OTHER		11	0	1,059	782	1,073	16	0	3,339	2,615	3,381
Subtotal:-----		37	38	30,659	25,356	30,998	45	64	104,199	110,452	104,852
PEACH-NECTRN(MAY)	MT										
CANADA		410	479	50,603	47,363	51,461	607	610	42,949	44,069	44,175
MEXICO		37	0	8,922	6,190	8,975	43	0	4,804	3,361	4,857
TAIWAN		0	0	5,476	4,194	5,476	0	0	5,178	4,269	5,178
OTHER		18	15	3,646	4,407	3,773	10	8	3,305	3,849	3,400
Subtotal:-----		465	493	68,647	62,153	69,686	659	618	56,236	55,548	57,610
PLUM-PRUNES(MAY)	MT										
CANADA		234	200	24,907	22,684	25,485	321	289	19,963	22,648	20,756
TAIWAN		0	0	21,848	13,733	21,848	0	0	15,071	12,198	15,071
HONG KONG		0	0	8,470	7,995	8,470	0	0	6,609	6,825	6,609
EU		0	17	5,740	2,176	5,771	0	42	4,505	2,222	4,574
UNITED KINGDOM		0	0	5,154	2,089	5,154	0	0	4,172	1,973	4,172
OTHER		34	5	5,987	7,468	6,115	68	3	4,732	5,657	4,845
Subtotal:-----		269	222	66,952	54,055	67,689	389	334	50,880	49,450	51,855
FR. AVOCADOS(OCT)	MT										
EU		51	178	54	835	5,269	94	186	107	749	5,644
CANADA		167	89	590	657	5,165	192	106	637	772	4,492
JAPAN		106	114	180	477	3,234	138	96	333	411	3,387
FRANCE		0	104	0	358	2,832	0	82	0	287	2,734
UNITED KINGDOM		51	50	54	262	1,854	94	37	107	237	2,086
OTHER		0	11	2	28	517	0	17	4	39	701
Subtotal:-----		324	392	826	1,996	14,186	423	406	1,080	1,972	14,224
FR. KIWI FRUIT(OCT)	MT										
TAIWAN		188	309	559	536	3,554	272	584	861	949	5,702
CANADA		341	537	1,182	1,624	3,387	390	615	1,564	1,947	4,298
KOREA, REPUBLIC		84	153	100	619	538	114	294	143	1,146	1,798
OTHER		47	408	271	603	880	61	525	312	840	1,274
Subtotal:-----		660	1,406	2,112	3,383	8,359	838	2,017	2,879	4,882	12,071
FRESH GRAPES (MAY)	MT										
CANADA		715	808	101,228	108,192	104,410	1,412	1,225	99,505	118,871	103,958
HONG KONG		266	17	19,431	18,018	19,431	316	6	21,566	20,938	21,566
TAIWAN		131	502	14,944	13,270	14,944	180	471	16,199	17,183	16,199
OTHER		860	2,018	48,062	62,219	48,367	1,074	2,069	62,046	76,171	62,401
Subtotal:-----		1,971	3,344	183,664	201,699	187,152	2,982	3,771	199,316	233,163	204,124
FR. STRAWBERRIES(JAN)	MT										
CANADA		785	991	785	991	35,611	1,581	2,005	1,581	2,005	49,034
JAPAN		0	0	0	0	3,967	0	0	0	0	20,768
MEXICO		0	10	0	10	2,583	0	7	0	7	1,732
EU		84	149	84	149	2,319	264	405	264	405	4,977
OTHER		21	73	21	73	813	73	282	73	282	2,745
Subtotal:-----		890	1,223	890	1,223	46,293	1,918	2,699	1,918	2,699	79,245
FR. ORNG INC TMPL(NOV)	MT										
CANADA		23,944	23,311	58,796	55,840	206,881	11,584	11,217	29,717	30,321	100,853
JAPAN		8,072	11,459	17,206	22,124	161,786	3,743	6,557	8,541	13,772	87,734
HONG KONG		7,641	10,471	24,445	20,449	128,569	3,825	5,117	11,566	11,221	61,277
OTHER		4,086	4,437	8,318	9,887	59,112	2,131	2,395	4,364	5,659	29,713
Subtotal:-----		43,744	49,679	108,765	109,300	556,348	21,283	25,486	54,189	60,873	279,578
FR. GRPFRUIT(SEP)	MT										
JAPAN		14,573	23,698	51,949	63,022	222,775	6,892	11,858	29,374	35,801	108,744
EU		20,024	22,925	57,456	57,474	116,865	10,065	10,372	28,213	27,717	61,288
CANADA		8,349	6,709	31,920	35,882	39,444	3,915	3,146	16,349	15,954	34,532
FRANCE		10,302	7,044	26,422	20,911	51,050	5,310	3,995	13,143	11,107	25,344
NETHERLANDS		4,645	5,088	15,814	15,968	29,021	2,167	2,235	7,632	7,432	14,005
OTHER		1,753	2,338	5,786	6,381	31,919	1,038	1,252	3,174	3,436	15,609
Subtotal:-----		44,699	57,670	147,111	162,760	441,003	21,910	26,628	77,109	82,908	220,253
FR. TANGERINES(NOV)	MT										
CANADA		1,890	2,033	5,489	5,573	8,616	1,676	1,547	4,864	4,501	7,582
EU		32	188	32	213	648	25	92	25	114	506
OTHER		4	88	59	96	180	10	54	156	61	254
Subtotal:-----		1,925	2,309	5,579	5,882	9,444	1,711	1,692	5,045	4,675	8,342
CANNED FRUIT											
CND PEACH&NECT(JUN)	MT										
JAPAN		287	125	3,236	3,144	5,812	307	160	3,591	3,542	6,391
CANADA		291	260	1,501	1,783	2,691	356	307	1,853	2,092	3,212
TAIWAN		178	98	1,742	1,163	2,460	184	78	1,487	1,020	2,106
MEXICO		165	90	1,746	1,203	1,775	126	71	963	977	1,421
HONG KONG		6	38	1,012	1,209	1,467	8	31	517	1,115	804
OTHER		456	611	3,498	4,360	5,611	395	483	3,234	3,758	5,033
Subtotal:-----		1,384	1,222	12,236	12,964	19,815	1,375	1,130	11,635	12,505	18,967

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
JAN 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CANNED FRUIT											
CND PEARS(JUN)	MT										
CANADA		118	137	971	944	1,508	117	144	1,006	965	1,579
EU		117	0	607	71	709	165	0	743	3	886
JAPAN		101	18	307	206	506	114	19	334	227	555
UNITED KINGDOM		98	0	392	0	466	148	0	551	0	662
MEXICO		0	5	258	148	321	0	4	241	139	310
OTHER		74	3	671	452	861	82	9	579	365	740
Subtotal:-----		410	163	2,814	1,820	3,905	478	176	2,903	1,769	4,071
CND PNEAPL(JAN)	MT										
CANADA		81	69	81	69	1,371	76	96	76	96	1,300
JAPAN		225	0	225	0	1,354	211	0	211	0	1,306
MEXICO		51	6	51	6	786	41	5	41	5	643
EU		26	0	26	0	533	25	0	25	0	476
GERMANY		0	0	0	0	245	0	0	0	0	224
OTHER		27	18	27	18	373	26	21	26	21	253
Subtotal:-----		409	93	409	93	4,417	380	122	380	122	3,977
FRT MIXTURES(JUN)	MT										
CANADA		558	498	4,141	4,253	6,542	731	536	5,643	5,304	8,786
JAPAN		413	426	2,444	4,080	4,708	513	530	2,848	4,846	5,512
HONG KONG		107	207	2,433	2,771	3,753	115	222	1,747	2,906	3,071
PHILIPPINES		219	4	3,091	1,046	3,337	235	6	3,204	1,217	3,489
SAUDI ARABIA		253	8	2,532	1,152	3,096	268	12	1,871	1,383	2,496
SINGAPORE		205	137	2,147	1,898	2,662	266	157	2,244	2,086	2,833
OTHER		663	482	7,766	4,469	10,797	654	527	7,608	5,484	11,198
Subtotal:-----		2,419	1,762	24,554	19,668	34,896	2,781	1,990	25,164	23,225	37,386
DRIED FRUIT											
DRD RAISINS(AUG)	MT										
EU		3,067	3,920	31,691	29,120	56,420	4,360	5,911	41,518	43,342	76,224
UNITED KINGDOM		1,151	1,624	14,016	13,919	25,585	1,689	2,488	18,847	21,311	35,568
JAPAN		2,547	2,447	11,702	12,892	25,290	3,328	3,604	14,515	19,228	31,577
GERMANY		1,247	1,462	7,730	7,519	13,256	1,683	1,922	9,845	9,961	17,158
CANADA		697	706	6,262	6,283	10,832	1,324	1,375	13,060	13,411	22,715
DENMARK		204	283	4,394	3,420	7,205	301	414	5,293	4,946	8,998
OTHER		2,317	2,974	23,456	20,765	35,256	3,302	4,530	31,029	32,828	49,675
Subtotal:-----		8,628	10,047	72,612	69,059	125,798	12,382	15,420	100,122	108,809	180,188
DRD PRUNES(AUG)	MT										
EU		2,486	2,550	26,113	15,847	48,625	4,043	5,278	37,378	35,028	69,456
GERMANY		688	1,553	7,636	5,511	17,419	1,040	2,750	9,530	11,924	21,920
JAPAN		906	986	7,829	7,881	15,311	1,738	2,274	12,676	17,200	25,815
ITALY		253	367	7,074	3,950	11,874	629	981	12,199	10,250	20,608
UNITED KINGDOM		865	279	4,123	2,077	7,498	1,101	639	5,085	3,613	9,401
CANADA		393	298	2,502	2,540	5,052	831	699	5,524	5,835	10,820
OTHER		882	859	12,257	8,736	18,937	1,392	1,852	17,792	18,149	28,288
Subtotal:-----		4,667	4,693	48,702	35,003	87,925	8,004	10,104	73,370	76,211	134,380
FRUIT JUICES(SSE)											
ORANGE JU CNC (DEC)	KL										
EU		4,500	4,938	8,902	11,016	107,753	1,743	2,220	3,317	5,053	42,269
CANADA		8,562	2,391	17,792	5,040	99,111	3,744	3,835	7,957	8,099	46,741
FRANCE		2,166	4,071	4,790	7,881	42,560	933	1,800	1,932	3,295	18,467
JAPAN		1,462	1,789	3,792	3,761	37,807	558	1,101	1,446	2,880	15,138
KOREA, REPUBLIC		1,105	236	1,215	2,062	30,421	547	337	593	2,315	13,872
NETHERLANDS		0	0	213	353	19,427	0	0	90	2,208	4,744
OTHER		3,902	5,209	7,642	9,610	64,198	1,448	1,778	2,931	3,714	22,064
Subtotal:-----		19,531	14,563	39,342	31,489	339,290	8,041	9,270	16,244	22,060	140,085
ORNG JU NTCNC(DEC)	KL										
CANADA		2,812	4,681	6,218	10,294	47,869	2,311	3,018	5,166	6,988	34,699
EU		2,461	1,101	3,662	5,088	23,888	1,941	648	2,827	2,857	15,598
FRANCE		2,110	374	2,972	928	8,423	1,706	221	2,360	600	5,770
BELGIUM-LUXEMBOU		0	20	8	981	6,262	0	11	7	611	4,278
UNITED KINGDOM		350	671	654	2,050	5,108	236	388	451	1,187	3,071
SWEDEN		406	342	554	606	4,763	475	292	606	546	5,257
OTHER		1,077	1,310	2,140	2,319	16,194	802	1,084	1,590	1,889	12,453
Subtotal:-----		6,755	7,434	12,575	18,307	92,714	5,529	5,041	10,188	12,281	68,006
GRPFRT JU CNC (DEC)	KL										
JAPAN		2,073	400	3,596	801	28,127	1,473	571	2,524	1,036	19,417
EU		1,099	230	2,118	1,377	20,014	393	209	758	681	9,297
NETHERLANDS		99	0	227	28	7,935	71	0	162	45	3,861
CANADA		560	150	1,141	208	7,066	404	247	821	339	5,268
FRANCE		173	0	234	577	4,002	72	0	98	248	1,807
UNITED KINGDOM		523	43	1,354	525	3,785	130	26	379	191	1,353
OTHER		229	113	293	317	2,390	147	74	184	219	1,376
Subtotal:-----		3,961	892	7,148	2,703	57,597	2,417	1,100	4,288	2,275	35,358
FRESH VEGETABLES											
FR ASPARAGUS(OCT)	MT										
CANADA		223	213	648	510	9,868	620	650	1,839	1,536	21,592
JAPAN		46	578	110	756	7,498	188	3,004	223	3,392	29,584
EU		103	45	128	48	1,866	328	182	374	188	5,501
SWITZERLAND		32	61	33	62	1,794	94	186	99	190	4,985
OTHER		17	5	17	5	264	59	18	59	18	846
Subtotal:-----		421	901	936	1,381	21,289	1,289	4,040	2,596	5,324	62,514
FR ONIONS(OCT)	MT										
CANADA		7,817	6,430	30,227	29,491	117,151	3,973	4,041	12,971	14,144	47,955
JAPAN		173	0	1,927	1,836	28,107	51	0	439	449	9,044
MEXICO		1,058	843	16,204	8,846	21,278	370	248	5,061	2,652	6,759
OTHER		1,015	97	7,970	5,991	16,469	957	138	4,292	2,719	8,083
Subtotal:-----		10,064	7,370	56,329	46,164	183,006	5,351	4,427	22,762	19,965	71,841
CANNED VEGETABLES											
CND SWT CORN(AUG)	MT										
EU		3,300	4,009	25,269	24,568	55,436	2,314	2,628	18,313	17,824	39,589
JAPAN		3,776	6,803	23,880	32,793	50,125	3,095	5,249	19,076	26,038	39,778
UNITED KINGDOM		1,332	875	11,296	5,944	21,814	911	601	8,066	4,168	15,301
GERMANY		1,139	548	7,057	6,535	17,723	840	409	5,250	4,671	12,902
TAIWAN		2,196	880	9,686	7,490	17,512	2,058	807	8,939	6,531	15,497
HONG KONG		848	867	9,174	7,360	15,846	389	616	4,695	5,627	8,313
OTHER		1,672	2,089	15,035	14,930	33,205	1,361	1,657	11,544	12,312	25,641
Subtotal:-----		11,793	14,648	83,044	87,141	172,124	9,218	10,957	62,568	68,331	128,818

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
JAN 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
CANNED VEGETABLES											
CND TOM PAS(JUL)	MT										
CANADA		2,343	2,197	27,289	26,542	46,004	1,929	1,876	22,141	22,872	38,098
KOREA, REPUBLIC		972	259	3,619	2,995	4,638	844	225	3,028	2,820	3,875
JAPAN		481	977	2,156	4,935	3,835	359	682	1,572	4,417	2,842
PHILIPPINES		200	297	1,826	2,427	3,517	142	217	1,280	1,739	2,434
OTHER		824	1,830	4,560	14,182	8,816	696	1,369	3,622	10,841	7,157
Subtotal:-----		4,820	5,561	39,450	51,080	66,811	3,970	4,368	31,643	42,689	54,406
CND TOM SAUCE(JUL)	MT										
CANADA		2,532	3,415	24,366	27,466	46,201	2,563	3,475	24,437	27,943	45,466
MEXICO		630	321	3,289	3,207	6,169	377	213	2,107	2,093	3,913
JAPAN		346	419	3,438	3,185	5,500	668	484	3,189	3,348	4,941
OTHER		700	988	7,450	8,011	11,559	856	1,267	7,333	8,593	11,773
Subtotal:-----		4,208	5,144	38,543	41,869	69,428	4,464	5,440	37,067	41,977	66,093
FRZN VEGETABLES											
FZN SWT CORN(JUL)	MT										
JAPAN		2,518	2,980	21,131	25,102	35,306	2,232	2,820	18,384	22,252	30,277
AUSTRALIA		544	117	3,734	4,011	5,498	493	111	2,735	2,975	4,164
HONG KONG		245	275	3,130	2,880	4,516	214	209	2,172	2,111	3,163
MEXICO		255	350	1,907	1,284	3,366	159	227	1,215	826	2,114
CANADA		102	212	2,206	1,391	3,041	76	170	1,595	1,086	2,133
OTHER		657	511	4,389	4,506	8,026	537	463	3,474	4,029	6,687
Subtotal:-----		4,322	4,445	36,497	39,173	59,754	3,711	4,000	29,576	33,279	48,538
FZN F FRY(JUL)	MT										
JAPAN		8,801	10,123	69,673	75,025	123,736	6,030	7,259	48,453	52,573	86,084
KOREA, REPUBLIC		1,017	1,460	7,087	9,233	13,959	738	948	5,601	6,027	10,376
HONG KONG		815	1,285	6,256	7,088	11,260	511	830	3,924	4,564	7,107
OTHER		5,433	7,012	31,963	43,782	53,587	4,109	5,358	23,580	31,977	40,111
Subtotal:-----		16,066	19,880	114,979	135,128	202,543	11,387	14,395	81,558	95,142	143,678
TREE NUTS											
ALMONDS UNSH(JUL)	MT										
INDIA		552	170	6,741	3,095	8,926	842	553	10,106	8,760	14,037
JAPAN		224	419	2,398	3,433	3,905	643	1,017	6,933	8,274	11,168
EU		20	15	783	669	1,108	59	82	1,140	1,232	1,832
OTHER		184	123	1,852	1,504	2,374	404	314	3,965	3,668	5,626
Subtotal:-----		979	727	11,774	8,702	16,313	1,948	1,965	22,144	21,934	32,664
ALMND SH/PRP(JUL)	MT										
EU		6,936	7,501	62,597	55,079	95,640	23,344	35,834	202,424	235,907	316,044
GERMANY		3,685	3,143	31,395	26,618	47,451	12,371	15,334	97,725	112,972	151,505
JAPAN		983	1,644	13,072	13,545	19,947	3,823	8,988	47,856	67,649	74,387
UNITED KINGDOM		1,047	958	8,023	7,373	12,584	3,485	4,440	25,574	29,271	40,895
NETHERLANDS		604	963	8,178	6,518	12,274	2,105	4,781	29,525	29,911	44,608
CANADA		441	768	6,378	6,727	9,996	1,510	2,621	21,643	26,660	34,463
OTHER		3,442	3,763	27,657	28,189	42,887	9,671	15,139	89,587	118,542	139,537
Subtotal:-----		11,802	13,676	109,705	103,540	168,469	38,349	62,582	361,509	448,758	564,432
WALNUTS SH(AUG)	MT										
EU		136	823	7,922	6,093	8,339	602	1,581	19,717	12,729	20,982
JAPAN		411	340	1,859	2,757	3,843	1,762	1,953	8,035	14,988	16,726
GERMANY		58	98	2,968	791	3,280	180	400	6,094	1,983	7,106
CANADA		238	177	1,463	1,215	2,353	1,024	540	5,693	3,855	9,456
SPAIN		10	175	1,787	1,121	1,807	98	452	4,715	2,977	4,833
ITALY		0	279	1,013	2,046	1,013	0	267	2,074	3,735	2,074
OTHER		277	429	2,819	2,848	4,023	940	1,809	9,347	11,740	14,533
Subtotal:-----		1,062	1,770	14,062	12,913	18,558	4,327	5,882	42,791	43,311	61,696
WALNUTS UNSH(AUG)	MT										
EU		56	1,015	30,556	34,411	30,827	112	1,759	61,181	65,491	61,544
SPAIN		0	451	9,974	9,298	9,993	0	787	19,567	17,670	19,606
GERMANY		0	38	6,589	7,941	6,675	0	67	13,403	15,050	13,521
NETHERLANDS		19	32	5,541	8,498	5,651	39	11	11,599	16,260	11,635
ITALY		19	373	4,501	5,318	4,501	36	645	8,853	10,348	8,853
OTHER		256	471	5,272	6,555	6,371	751	900	11,413	13,933	13,918
Subtotal:-----		312	1,487	35,828	40,966	37,199	863	2,659	72,594	79,424	75,463
HOPS&PRODUCTS											
HOP PELTS(SEP)	MT										
BRAZIL		23	10	708	300	1,369	87	81	3,229	1,480	6,191
CANADA		64	106	309	446	1,041	456	691	2,099	2,989	7,124
EU		77	62	249	345	724	545	330	1,642	2,291	4,588
MEXICO		1	0	127	0	483	5	0	844	0	3,291
COLOMBIA		0	0	443	54	443	0	0	3,510	322	3,510
GERMANY		58	0	108	48	335	407	0	810	320	1,819
OTHER		236	120	684	346	1,053	1,148	640	3,984	1,788	5,984
Subtotal:-----		401	297	2,520	1,491	5,113	2,241	1,742	15,308	8,870	30,688
HOP EXTRACT(SEP)	MT										
EU		279	156	842	580	1,458	3,844	2,018	12,330	9,626	24,964
GERMANY		58	72	449	250	710	1,142	667	7,267	3,151	11,849
MEXICO		60	330	344	948	706	1,254	1,551	8,098	7,022	12,127
BRAZIL		110	98	349	243	402	499	849	2,111	2,630	3,040
NETHERLANDS		48	16	124	97	278	565	490	1,575	3,389	5,119
KOREA, REPUBLIC		44	24	55	37	258	641	600	832	869	2,668
OTHER		38	101	531	498	1,081	693	2,229	12,167	10,652	22,356
Subtotal:-----		531	709	2,119	2,306	3,905	6,931	7,247	35,538	30,798	65,154
HOPS, NSPF(SEP)	MT										
EU		203	224	1,188	719	2,073	924	1,001	6,379	3,399	10,842
GERMANY		158	107	823	448	1,662	674	347	4,209	1,851	8,379
UNITED KINGDOM		45	116	273	263	305	250	623	1,649	1,438	1,856
JAPAN		121	67	203	97	206	763	365	1,137	588	1,149
OTHER		39	36	198	126	333	568	290	2,382	1,439	4,091
Subtotal:-----		363	327	1,590	942	2,612	2,255	1,656	9,898	5,426	16,082
WINE											
GRAPE WINE(JAN)	KL										
EU		2,959	1,965	2,959	1,965	45,115	3,960	3,741	3,960	3,741	66,545
CANADA		1,939	2,044	1,939	2,044	32,584	2,290	2,765	2,290	2,765	45,078
UNITED KINGDOM		1,451	918	1,451	918	24,121	2,019	1,848	2,019	1,848	38,803
JAPAN		878	736	878	736	12,347	1,380	1,213	1,380	1,213	17,774
DENMARK		453	149	453	149	6,559	329	147	329	147	6,312
OTHER		1,431	2,270	1,431	2,270	26,903	2,094	3,144	2,094	3,144	36,079
Subtotal:-----		7,207	7,015	7,207	7,015	116,948	9,724	10,863	9,724	10,863	165,476

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
JAN 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR FRT & MLNS											
FR APPLES(JUL)	MT										
NEW ZEALAND		0	0	284	2,296	28,513	0	0	333	2,674	30,602
CANADA		3,871	2,230	27,307	21,825	46,611	1,399	1,422	9,735	9,302	16,772
OTHER		0	89	5,062	10,527	35,277	0	55	3,030	6,089	18,006
Subtotal:-----		3,871	2,319	32,652	34,649	110,401	1,399	1,477	13,098	18,066	65,380
FR PEARS(JUL)	MT										
CHILE		948	1,081	969	1,224	44,689	349	349	362	392	14,858
ARGENTINA		0	0	0	0	14,604	0	0	0	0	9,230
OTHER		95	25	2,066	1,839	5,479	272	96	5,070	4,896	8,178
Subtotal:-----		1,043	1,106	3,035	3,062	64,772	622	445	5,432	5,287	32,266
APRICOT (MAY)	MT										
CHILE		96	118	699	781	699	62	80	441	489	441
NEW ZEALAND		65	99	65	99	158	174	170	174	170	405
OTHER		0	0	20	66	55	0	0	52	108	132
Subtotal:-----		161	217	783	946	911	236	250	668	767	978
PEACH-NEC(MAY)	MT										
CHILE		15,391	19,062	21,617	25,638	40,869	9,645	12,001	13,634	16,178	25,810
OTHER		45	0	881	214	1,088	32	0	636	182	997
Subtotal:-----		15,436	19,062	22,498	25,851	41,956	9,677	12,001	14,269	16,360	26,807
PLUM-PRUNE(MAY)	MT										
CHILE		5,559	6,568	8,567	7,868	23,893	3,510	4,254	5,437	5,110	15,116
OTHER		7	0	81	98	98	4	0	70	101	80
Subtotal:-----		5,566	6,568	8,648	7,965	23,990	3,514	4,254	5,507	5,211	15,196
FRESH GRAPES (MAY)	MT										
CHILE		52,900	55,041	75,164	71,665	284,846	41,733	45,225	60,640	59,877	207,103
MEXICO		0	0	37,056	41,305	37,056	0	0	67,144	55,211	67,144
OTHER		100	1	1,774	609	2,023	84	1	680	431	854
Subtotal:-----		53,000	55,041	113,994	113,578	323,924	41,817	45,226	128,464	115,519	275,101
FR RASPBRY(JAN)	MT										
CANADA		0	0	0	0	5,122	0	0	0	0	9,292
OTHER		42	69	42	69	774	87	129	87	129	1,484
Subtotal:-----		42	69	42	69	5,896	87	129	87	129	10,776
FR STRAWBRIS(JAN)	MT										
MEXICO		1,064	1,523	1,064	1,523	12,747	1,806	3,689	1,806	3,689	17,985
OTHER		162	164	162	64	1,480	286	152	286	152	3,491
Subtotal:-----		1,226	1,587	1,226	1,587	14,227	2,092	3,841	2,092	3,841	21,476
FR BANANA(JAN)	MT										
COSTA RICA		88,395	67,944	88,395	67,944	922,519	25,036	18,978	25,036	18,978	272,504
ECUADOR		61,813	62,246	61,813	62,246	761,367	16,863	15,763	16,863	15,763	205,877
COLOMBIA		46,884	51,563	46,884	51,563	596,321	12,817	15,035	12,817	15,035	166,146
OTHER		79,640	103,340	79,640	103,340	1,232,936	21,365	24,739	21,365	24,739	350,376
Subtotal:-----		276,732	285,092	276,732	285,092	3,513,144	76,081	74,516	76,081	74,516	994,903
FR MANGO(JAN)	MT										
MEXICO		0	0	0	0	94,439	0	0	0	0	71,626
OTHER		2,177	1,556	2,177	1,556	16,518	2,551	1,847	2,551	1,847	15,619
Subtotal:-----		2,177	1,556	2,177	1,556	110,957	2,551	1,847	2,551	1,847	87,245
FR PINAPLE(JAN)	MT										
COSTA RICA		4,804	5,713	4,804	5,713	72,226	2,208	2,403	2,208	2,403	30,880
HONDURAS		1,299	2,695	1,299	2,695	26,273	337	742	337	742	7,482
OTHER		3,126	609	3,126	609	25,896	766	191	766	191	6,986
Subtotal:-----		9,229	9,017	9,229	9,017	124,395	3,312	3,335	3,312	3,335	45,348
FR CANTLPE(MAY)	MT										
MEXICO		1,848	2,830	66,665	31,059	104,864	630	894	21,435	9,723	29,666
COSTA RICA		3,275	6,790	5,219	10,078	35,094	1,615	2,861	4,822	19,796	19,796
HONDURAS		17,144	12,970	28,799	23,360	55,437	4,896	3,014	7,616	5,532	14,510
OTHER		4,869	6,623	25,121	30,348	45,451	1,239	1,813	6,106	8,807	11,533
Subtotal:-----		27,136	29,214	125,804	94,845	240,846	8,380	8,582	37,816	28,885	75,505
FR MELON,OT(MAY)	MT										
MEXICO		3,686	4,526	36,591	30,667	51,787	1,660	1,379	13,451	10,870	17,944
COSTA RICA		1,333	1,006	2,237	1,877	24,845	723	468	1,217	782	11,269
OTHER		10,964	9,446	21,351	23,070	45,268	3,663	3,420	6,669	7,998	14,826
Subtotal:-----		15,982	14,978	60,180	55,613	121,899	6,047	5,266	21,337	19,651	44,039
FR ORANGES(NOV)	MT										
AUSTRALIA		0	0	0	0	4,556	0	0	0	2	6,267
OTHER		479	638	944	1,706	5,795	175	353	361	814	2,007
Subtotal:-----		479	638	944	1,707	10,350	175	355	361	818	8,274
CANNED FRUIT											
CND MANDRN(JAN)	MT										
EU		1,193	1,615	1,193	1,615	19,589	1,129	1,275	1,129	1,275	18,494
SPAIN		1,193	1,615	1,193	1,615	19,569	1,128	1,275	1,128	1,275	18,474
CHINA, PEOPLES R		860	1,135	860	1,135	19,713	698	847	698	847	16,285
OTHER		105	30	105	30	988	108	23	108	23	1,163
Subtotal:-----		2,158	2,780	2,158	2,780	40,290	1,936	2,145	1,936	2,145	35,942
CND BLK OLV(NOV)	MT										
EU		857	1,232	2,602	3,615	12,275	1,829	2,344	5,773	6,660	24,927
SPAIN		715	1,099	2,259	3,005	10,250	1,464	1,934	4,727	5,244	19,913
MOROCCO		186	305	958	651	2,661	348	530	1,718	1,112	4,733
OTHER		19	31	45	47	125	35	53	72	92	236
Subtotal:-----		1,062	1,567	3,605	4,312	15,061	2,211	2,927	7,564	7,864	29,896
CND GRN OLV(NOV)	MT										
EU		1,964	2,469	11,276	9,913	41,192	4,931	6,186	30,355	24,690	104,739
SPAIN		1,952	2,441	10,992	9,687	40,160	4,902	6,147	29,897	24,303	102,781
OTHER		218	301	477	540	2,058	342	432	815	823	3,331
Subtotal:-----		2,181	2,770	11,753	10,452	43,249	5,273	6,618	31,169	25,513	108,070
CND PEACH(JUN)	MT										
EU		2,233	1,736	16,834	12,360	20,063	1,451	1,042	11,718	7,114	13,745
GREECE		2,084	1,680	15,800	11,376	19,021	1,347	1,010	10,989	6,491	12,996
OTHER		1	581	1,464	3,680	1,858	3	285	1,101	1,880	1,363
Subtotal:-----		2,234	2,317	18,298	16,040	21,921	1,454	1,327	12,819	8,994	15,109
CND PINAPLE(JAN)	MT										
THAILAND		17,082	13,959	17,082	13,959	172,014	11,206	7,245	11,206	7,245	101,834
PHILIPPINES		11,085	15,890	11,085	15,890	128,465	7,749	10,965	7,749	10,965	88,280
OTHER		2,993	3,170	2,993	3,170	41,758	1,452	1,403	1,452	1,403	16,877
Subtotal:-----		31,161	33,019	31,161	33,019	342,237	20,407	19,612	20,407	19,612	206,991
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		510	772	6,072	5,170	10,217	1,148	1,997	14,349	12,888	23,134
OTHER		56	64	174	340	299	116	143	393	816	729
Subtotal:-----		566	835	6,247	5,509	10,516	1,264	2,140	14,742	13,704	23,863

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
JAN 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
DRIED FRUIT											
DATES(SEP)	MT										
PAKISTAN		705	530	1,228	1,016	3,720	824	577	1,389	1,105	4,036
CHINA, PEOPLES R		193	59	348	211	1,090	191	108	439	301	1,352
OTHER		28	43	310	255	689	58	96	614	562	1,330
Subtotal:-----		926	632	1,885	1,481	5,498	1,072	781	2,442	1,968	6,518
DRD FIG(SEP)	MT										
EU		0	0	967	761	969	1	0	2,398	1,820	2,403
GREECE		0	0	942	727	943	1	0	2,296	1,695	2,301
TURKEY		38	119	278	570	1,240	19	141	629	1,123	1,300
OTHER		5	0	355	1,209	562	6	0	170	278	266
Subtotal:-----		42	119	1,600	2,640	2,771	26	141	3,197	3,519	3,969
DRD RAISIN(AUG)	MT										
MEXICO		190	186	3,108	3,285	3,662	195	210	2,077	3,010	2,508
CHILE		0	0	369	507	1,441	0	0	433	618	1,774
TURKEY		258	356	817	1,486	1,523	279	380	885	1,485	1,655
OTHER		58	0	185	87	87	50	659	226	134	134
Subtotal:-----		448	600	4,318	5,463	6,717	474	659	3,445	5,339	6,070
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
EU		20,158	26,128	110,710	117,454	229,468	5,492	5,223	36,988	26,105	69,762
ARGENTINA		248	13,476	131,855	214,388	222,727	375	2,156	40,558	40,306	58,379
GERMANY		17,057	21,021	92,995	89,124	186,794	4,663	4,343	29,616	20,023	56,118
OTHER		26,693	43,380	245,556	315,647	369,967	9,046	8,565	83,617	65,847	118,171
Subtotal:-----		47,100	82,984	489,121	647,489	822,162	14,913	15,944	161,162	132,258	246,312
FCOJ(DEC)	KL										
BRAZIL		96,394	85,648	162,508	233,155	1,089,726	15,873	16,436	26,913	43,983	190,381
OTHER		6,826	11,779	11,822	19,863	137,517	1,566	2,976	2,488	4,427	25,686
Subtotal:-----		103,219	97,427	174,329	253,018	1,227,243	17,439	19,412	29,401	48,411	216,066
GRAPE JU(JAN)	KL										
SWEDEN		8,188	0	8,188	0	51,169	2,713	0	2,713	0	16,067
EU		258	1,877	258	1,877	24,178	187	929	187	929	8,460
OTHER		6,070	1,712	6,070	1,712	54,769	2,381	614	2,381	614	19,669
Subtotal:-----		14,516	3,588	14,516	3,588	130,116	5,280	1,544	5,280	1,544	44,196
PNEAPL JUCN(JAN)	KL										
THAILAND		13,752	15,804	13,752	15,804	156,558	2,985	3,041	2,985	3,041	30,322
PHILIPPINES		10,916	9,155	10,916	9,155	113,215	2,417	1,969	2,417	1,969	23,255
OTHER		2,075	1,179	2,075	1,179	24,227	611	352	611	352	6,782
Subtotal:-----		26,743	26,138	26,743	26,138	294,000	6,013	5,361	6,013	5,361	60,359
PNEAPL JUNC(JAN)	KL										
PHILIPPINES		4,059	6,031	4,059	6,031	29,454	1,509	2,235	1,509	2,235	10,933
OTHER		1,585	1,481	1,585	1,481	13,450	615	554	615	554	4,309
Subtotal:-----		5,644	7,513	5,644	7,513	42,904	2,124	2,789	2,124	2,789	15,242
FROZEN FRUIT											
FZN STRBRY(DEC)	MT										
MEXICO		1,082	649	1,698	1,178	18,446	1,291	570	1,949	1,192	17,277
OTHER		95	79	327	185	1,274	466	407	814	552	3,826
Subtotal:-----		1,176	728	2,024	1,363	19,720	1,757	977	2,763	1,744	21,103
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		3,597	2,307	6,580	4,613	11,424	4,871	3,150	8,496	6,185	14,214
OTHER		15	54	81	136	729	17	33	131	103	783
Subtotal:-----		3,612	2,361	6,661	4,749	12,152	4,887	3,183	8,627	6,288	14,998
FR CARROT(OCT)	MT										
CANADA		4,295	4,768	25,734	28,216	39,943	1,268	1,110	6,501	6,715	10,429
MEXICO		1,544	1,276	3,165	4,620	10,923	419	305	749	886	3,267
OTHER		31	18	190	83	566	15	13	130	47	370
Subtotal:-----		5,870	6,062	29,089	32,918	51,432	1,703	1,427	7,380	7,648	14,067
FR CABBAGE(OCT)	MT										
CANADA		1,270	1,196	6,611	5,993	17,625	281	277	1,298	1,435	4,420
MEXICO		779	962	1,884	2,170	8,318	166	173	357	344	1,542
OTHER		2	122	25	143	871	3	35	18	42	565
Subtotal:-----		2,051	2,280	8,521	8,307	26,815	451	485	1,672	1,821	6,526
FR CELERY(OCT)	MT										
MEXICO		1,973	1,625	2,310	2,778	11,581	769	520	843	871	4,719
CANADA		0	18	614	381	4,643	0	10	142	122	1,340
OTHER		38	0	124	60	600	6	0	22	19	117
Subtotal:-----		2,011	1,642	3,048	3,219	16,823	776	530	1,006	1,012	6,176
FR CUCMBR(OCT)	MT										
MEXICO		40,916	45,620	106,908	102,527	213,505	14,224	22,481	35,803	47,350	76,639
OTHER		6,382	3,748	10,665	6,096	25,337	1,326	721	2,828	2,059	8,554
Subtotal:-----		47,299	49,368	117,573	108,623	238,842	15,550	23,202	38,631	49,409	85,192
FR CAULFLWR(OCT)	MT										
CANADA		0	0	93	536	3,018	0	0	26	174	998
MEXICO		214	394	214	1,134	666	72	113	72	336	319
OTHER		0	0	0	0	192	0	0	0	0	133
Subtotal:-----		214	394	307	1,670	3,876	72	113	98	511	1,449
FR GARLIC(OCT)	MT										
MEXICO		0	6	56	110	10,500	0	13	137	148	11,055
CHINA, PEOPLES R		316	1,184	724	11,716	14,338	248	692	548	5,642	7,236
OTHER		666	486	865	767	4,333	689	633	886	826	4,854
Subtotal:-----		982	1,676	1,646	12,594	29,172	937	1,337	1,571	6,616	23,145
FR ONION(OCT)	MT										
MEXICO		14,403	15,060	41,250	42,319	192,287	9,054	13,132	31,314	31,908	93,837
OTHER		2,019	7,732	5,811	21,318	24,451	792	3,130	2,424	7,778	10,015
Subtotal:-----		16,422	22,792	47,061	63,637	216,739	9,846	16,262	33,738	39,686	103,853
FR PEPPERS(OCT)	MT										
MEXICO		27,532	25,613	56,013	50,699	138,708	26,568	24,636	53,253	51,947	134,106
EU		0	7	2,875	4,674	16,090	0	28	8,147	11,094	37,118
NETHERLANDS		0	7	2,778	4,530	15,624	0	27	7,863	10,659	35,960
OTHER		153	49	550	730	3,994	74	49	800	1,209	6,733
Subtotal:-----		27,685	25,669	59,438	56,104	158,793	26,641	24,714	62,200	64,250	177,957
FR SEED POT(OCT)	MT										
CANADA		6,042	7,256	12,690	16,872	74,524	785	1,265	1,849	2,793	11,499
OTHER		16	3	23	36	137	8	2	12	21	81
Subtotal:-----		6,059	7,259	12,713	16,908	74,661	794	1,267	1,860	2,814	11,579
FR TBL POT(OCT)	MT										
CANADA		26,833	24,691	78,905	94,780	227,512	3,999	5,757	11,951	21,170	38,014
OTHER		0	0	13	38	13	0	0	3	18	3
Subtotal:-----		26,833	24,691	78,918	94,818	227,525	3,999	5,757	11,955	21,188	38,017

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
JAN 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
FRESH VEGETABLES											
FR TOMATO(OCT)	MT										
MEXICO		57,745	49,028	82,105	108,715	365,168	62,211	61,261	79,946	93,894	289,182
OTHER		1,132	1,132	2,366	4,939	15,744	477	860	2,406	5,996	18,273
Subtotal:-----		58,459	50,160	84,471	113,654	380,912	62,688	62,121	82,352	99,890	307,454
FR ASPARG(OCT)	MT										
MEXICO		3,145	2,428	3,966	3,698	22,613	5,252	4,457	6,673	6,626	31,593
OTHER		533	675	5,059	6,339	7,239	515	933	5,357	7,867	7,620
Subtotal:-----		3,677	3,102	9,025	10,037	29,852	5,767	5,390	12,030	14,493	39,213
CANNED VEGETABLES											
CND TOM PST(JUL)	MT										
MEXICO		0	0	0	193	20,312	0	0	0	129	14,818
CHILE		207	172	5,263	910	7,176	112	106	2,857	622	4,122
OTHER		338	896	2,902	4,384	3,881	262	626	1,978	2,796	2,789
Subtotal:-----		545	1,067	8,165	5,487	31,369	374	732	4,835	3,547	21,730
CND TOM SAUCE(JUL)	MT										
CANADA		654	434	2,733	2,870	4,465	349	296	1,480	1,814	2,499
CHILE		23	0	177	405	2,239	12	0	75	250	1,325
DOMINICAN REPUB		0	0	1,145	407	1,627	0	0	740	287	1,050
OTHER		237	558	1,035	1,573	1,552	110	203	774	834	1,115
Subtotal:-----		915	993	5,091	5,255	9,883	471	499	3,070	3,185	5,989
CND TOMATO(JUL)	MT										
CHILE		1,032	422	9,546	5,381	16,630	461	195	3,839	2,630	7,462
EU		1,758	2,414	10,402	10,011	16,765	605	739	4,102	3,088	6,087
ITALY		1,707	2,397	9,410	9,839	15,560	587	733	3,483	3,026	5,398
OTHER		915	455	9,502	10,076	11,901	305	175	3,356	3,598	4,363
Subtotal:-----		3,705	3,291	29,450	25,468	45,297	1,371	1,109	11,297	9,316	17,912
CND MSHROOM(JUL)	MT										
INDONESIA		1,627	573	10,252	5,376	15,958	3,969	1,285	26,453	11,861	39,390
CHINA, PEOPLES R		782	881	7,280	8,102	11,240	1,397	1,477	13,013	14,225	19,332
OTHER		2,152	1,912	12,246	11,168	21,018	4,517	3,946	27,206	26,045	45,934
Subtotal:-----		4,562	3,366	29,778	24,646	48,216	9,883	6,707	66,673	52,201	104,856
FROZEN VEGETABLES											
FZN BROCLI(SEP)	MT										
MEXICO		16,524	10,333	69,749	37,635	159,838	10,648	6,905	46,043	25,891	106,192
OTHER		1,551	1,299	9,343	10,824	15,408	1,015	894	6,998	7,033	10,933
Subtotal:-----		18,076	11,632	79,092	48,459	175,246	11,663	7,799	53,041	32,924	117,125
FZN CAULFLR(SEP)	MT										
MEXICO		3,985	5,680	16,762	20,101	20,199	2,770	5,448	11,863	18,027	14,433
OTHER		124	340	750	1,561	1,899	86	142	517	739	1,249
Subtotal:-----		4,110	6,020	17,512	21,662	22,097	2,856	5,590	12,381	18,766	15,682
FZN POTATO(SEP)	MT										
CANADA		10,248	10,666	41,468	51,238	121,553	5,678	5,881	23,138	28,429	66,834
OTHER		26	5	166	103	402	18	13	111	110	259
Subtotal:-----		10,274	10,671	41,634	51,341	121,956	5,696	5,894	23,250	28,538	67,093
TREE NUTS											
PISTACHIO NSH(SEP)	MT										
HONG KONG		0	15	0	15	40	0	35	0	35	81
TURKEY		3	60	0	90	7	8	162	24	246	24
OTHER		0	0	0	0	0	0	0	0	1	2
Subtotal:-----		3	75	0	105	47	8	197	24	282	107
CASHEW NUT(AUG)	MT										
INDIA		3,532	4,147	18,030	19,763	31,066	14,527	17,193	80,077	82,439	136,033
BRAZIL		2,331	1,190	16,206	11,390	27,735	8,985	5,507	62,872	47,133	109,075
OTHER		450	281	3,626	2,062	5,845	1,467	1,147	11,766	7,061	19,312
Subtotal:-----		6,313	5,619	37,863	33,215	64,645	24,978	23,847	154,715	136,634	264,421
FILBERTS(AUG)	MT										
TURKEY		422	396	2,339	2,150	3,944	1,122	1,549	6,247	6,649	10,245
OTHER		2	7	44	87	77	9	34	188	247	300
Subtotal:-----		424	402	2,383	2,238	4,022	1,131	1,583	6,435	6,896	10,544
PECANS NSH(SEP)	MT										
MEXICO		1,011	1,523	12,281	2,779	12,772	2,766	1,646	32,563	3,613	33,861
OTHER		0	0	148	327	148	0	0	449	1,081	449
Subtotal:-----		1,011	1,523	12,429	3,106	12,920	2,766	1,646	33,013	4,694	34,310
WINES											
CHMP&SPRK WN(JAN)	KL										
EU		1,050	1,260	1,050	1,260	30,523	8,149	9,862	8,149	9,862	265,363
FRANCE		276	414	276	414	10,065	4,785	6,062	4,785	6,062	179,059
ITALY		364	539	364	539	11,753	1,729	2,566	1,729	2,566	50,998
OTHER		7	23	7	23	302	37	63	37	63	1,034
Subtotal:-----		1,059	1,283	1,059	1,283	30,825	8,186	9,924	8,186	9,924	266,397
FT&VERM WN(JAN)	KL										
EU		526	957	526	957	12,389	1,729	3,696	1,729	3,696	48,713
ITALY		244	508	244	508	6,954	556	1,291	556	1,291	16,829
SPAIN		214	329	214	329	3,278	682	1,630	682	1,630	14,484
PORTUGAL		41	68	41	68	1,295	408	560	408	560	13,324
OTHER		15	10	15	10	159	67	47	67	47	671
Subtotal:-----		541	967	541	967	12,547	1,796	3,743	1,796	3,743	49,384
OTH GP WINE(JAN)	KL										
EU		6,180	10,556	6,180	10,556	152,864	24,435	32,844	24,435	32,844	553,012
FRANCE		2,111	3,075	2,111	3,075	55,169	14,181	14,772	14,181	14,772	303,623
ITALY		3,138	5,987	3,138	5,987	75,390	7,929	14,087	7,929	14,087	186,307
OTHER		2,571	2,894	2,571	2,894	42,637	5,461	7,215	5,461	7,215	97,598
Subtotal:-----		8,751	13,451	8,751	13,451	195,502	29,896	40,059	29,896	40,059	650,610
OTH WN PROD(JAN)	KL										
JAPAN		225	152	225	152	2,276	725	469	725	469	7,018
EU		277	495	277	495	3,709	427	664	427	664	5,144
CANADA		23	227	23	227	2,084	30	282	30	282	2,953
OTHER		76	121	76	121	1,148	155	233	155	233	2,121
Subtotal:-----		601	994	601	994	9,216	1,337	1,648	1,337	1,648	17,236
CUT FLOWERS											
ROSES(JAN)	NONE										
COLOMBIA		0	0	0	0	0	8,669	9,322	8,669	9,322	80,312
OTHER		0	0	0	0	0	2,179	2,566	2,179	2,566	27,079
Subtotal:-----		0	0	0	0	0	10,848	11,888	10,848	11,888	107,392
CARNATIONS(JAN)	NONE										
COLOMBIA		0	0	0	0	0	8,810	8,348	8,810	8,348	82,941
OTHER		0	0	0	0	0	157	136	157	136	2,143
Subtotal:-----		0	0	0	0	0	8,968	8,485	8,968	8,485	85,084

Get The Answers Fast:

Did Bolivia Boost Barley Imports?

Does Portugal Produce Pears?

Did Egypt Export Eggs? Will Nigeria

Need More Nuts? How Does Foreign Fruit

Fare in France? Are Apples Allowed Into Australia?

How Much Cotton Does Canada Cultivate? Will More Meat

Move Into Mexico? Did Denmark Demonstrate a Demand for Duck?

Is Beer a Big Export for Brazil? Does Tunisia Tariff Tobacco? How Well

Does Guatemalan Grain Grow? Does India Import Indigo? Has Belgium Banished

Bacon at Its Borders? Does Poland Process Potatoes? Are Peasants Protected in

Paraguay? Is Soybean Significant in Sweden? Does Cuba's Trade in Consumer Goods?

Are Pakistan's Fruit Production Policies a Good Match for the Librarian's Librarian's Librarian?

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